

**SCHOOL DISTRICT REORGANIZATION IN IOWA: CONSIDERATIONS FOR
ADMINISTRATORS, SCHOOL BOARDS, AND COMMUNITIES**

A Dissertation
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of the Requirements for the Degree
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by Christopher L. Anderson
November 2009

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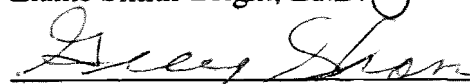
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SCHOOL DISTRICT REORGANIZATION IN IOWA: CONSIDERATIONS FOR ADMINISTRATORS, SCHOOL BOARDS, AND COMMUNITIES

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November, 2009
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The problem. To consider reorganization of two or more Iowa school districts in light of declining enrollment, dwindling financial resources, the end of the state budget guarantee program and pressure to provide the most rigorous and relevant education possible to Iowa's students. Specifically, the problem is to determine what two or more school districts should do to facilitate the merging of their respective districts, once the decision to consolidate has been made.

Procedures. Qualitative methodology was employed using semistructured interviews to gather information from nine superintendents and twelve school board members involved in six successful reorganizations. Interview candidates were selected using a table of random numbers. Flexibility was built into the interviews in order to permit subjects to expand their answers to open ended questions. Through interviews and document reviews the researcher determined activities school districts should undertake to ensure successful reorganization.

Findings. Respondents reported reorganization was prompted by declining enrollment, state incentives, financial pressures, and the desire to increase opportunities for students. Respondents indicated that seeking stakeholder input, a history of sharing and cooperation between districts, strong leadership, the use of a consultant and making efforts to keep stakeholders informed regarding the process enhanced the reorganization. Lack of trust, rivalries, activities and transportation issues and concerns about identity loss led to negative feelings.

Conclusions. A history of sharing and cooperation, strong leadership, and frequent communication with stakeholders appears to enhance the reorganization action, while a lack of trust coupled with fear of change is detrimental to the process.

Recommendations. School districts pondering reorganization should consider enrollment trends, the financial state of their districts, the advantages to students of reorganizing, and consider program sharing before reorganization. Districts should explore state incentives to facilitate the process. Frequent stakeholder input should be solicited with plans and outcomes communicated often. Strong leadership from superintendents and boards is necessary for successful reorganization

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Chapter 1

INTRODUCTION

School district reorganization, more commonly known as merger or consolidation, has been and will continue to be a divisive topic in communities facing the possibility of merging their school with or being absorbed by another district. Whether the concern among stakeholders is caused by loyalty to their school, fear of a continued and accelerated decline in their town's social and economic condition, or some other reason, the process of merging school districts is rarely without significant challenges. Sometimes anger over reorganization is directed at state legislatures. The policy director for the Rural School and Community Trust has stated, "Whenever legislators get involved in a school funding debate, almost the first thing they say is, if we're going to put more money into these schools, we're going to make sure that they're operating efficiently," (Strange as cited in Russo, 2006, p. 11). On other occasions, opponents of consolidation aim their consternation at local school district leaders. However, "the reality is that few local boards of education decide to consolidate willingly, and many do it for financial rather than educational reasons" (Russo, 2006, p. 12).

Despite the potential for division in communities, school district reorganization has been the norm across the country for roughly 100 years. For example, "from 1931 to 1982, the number of school districts in the United States has decreased from 127,530 to 15,912, a drop of 88 percent" (Kliwer, 2001, p. 1). During the past century Iowa has mirrored the nationwide trend toward fewer but larger school districts. In 1960, there were 4,652 independent school districts operating in the state of Iowa (Iowa Association of School Boards, 2004). In 1970, Iowa had 453 school districts. About this time the state

began offering financial incentives designed to encourage school districts to share programs, faculty and staff, and facilities. By “July 1, 1996, the number of school districts was reduced... down to 379” (Ghan, 1996, p. 1). The trend has been for children in Iowa and across the nation to attend school in fewer and larger districts. Indeed,

Seventy-two percent of Iowa’s K-12 children attend schools in districts with 1000 or more students, up from 67 percent 15 years ago. Enrollment in districts with fewer than 1000 children has decreased from 158,000 to 142,000 during the same period (Kliewer, 2001, p. 2).

Despite the reduction of districts, the small school has not become extinct. Iowa currently has 365 public high school districts of which roughly 140 serve fewer than 200 students (Roos & Boone, 2005, p. 1A). Table 1 from the Iowa Department of Education illustrates the differences in numbers of students served by school districts in Iowa with fewer than 400 and greater than 400 students.

Table 1

2005-06 Public School Certified Enrollment, Fewer Than 400 Students and Greater Than 400 Students

| Enrollment size | Number of districts | Percent of districts | Number of students served | Percent of students served |
|-----------------|---------------------|----------------------|---------------------------|----------------------------|
| <400 | 88 | 24.1% | 24,586 | 5.1% |
| 400+ | 277 | 75.9% | 458,519 | 94.9% |

Source: Iowa Department of Education, Division of Financial and Information Services, Certified Enrollment File.

Table 2 from the Iowa Department of Education illustrates the differences in numbers of students served by school districts in Iowa with fewer than 1,000 and greater than 1,000 students.

Table 2

2005-06 Public School Certified Enrollment, Fewer Than 1,000 Students and Greater Than 1,000 Students

| Enrollment size | Number of districts | Percent of districts | Number of students served | Percent of students served |
|-----------------|---------------------|----------------------|---------------------------|----------------------------|
| <1,000 | 251 | 68.8% | 129,829 | 26.9% |
| 1,000+ | 114 | 31.2% | 483,105 | 73.1% |

Source: Iowa Department of Education, Division of Financial and Information Services, Certified Enrollment File.

Small schools face a continuing struggle with declining enrollment. "In Iowa, two-thirds of the state's districts taught fewer children in 2001 than they had in 1992. This kind of demographic trend is being seen in many other Midwestern states as well, resulting in more and more calls for school consolidation" (Anderson, 2003, p. 1). Table 3 from the Iowa Department of Education shows how the aforementioned demographic trend played out in Iowa during the 20 year span of time between July 1, 1986, and July 1, 2006.

Table 3

Distribution of Public School Districts and Students by Enrollment in Iowa

| Enrollment | 1985-1986 | | | | 2004-2005 | | | | 2005-2006 | | | |
|-------------|------------------|------|-----------------|------|------------------|------|-----------------|------|------------------|------|-----------------|------|
| | <u>Districts</u> | | <u>Students</u> | | <u>Districts</u> | | <u>Students</u> | | <u>Districts</u> | | <u>Students</u> | |
| | N | % | N | % | N | % | N | % | N | % | N | % |
| <250 | 52 | 1.9 | 10,124 | 2.1 | 30 | 8.2 | 5,672 | 1.2 | 32 | 8.8 | 6,119 | 1.3 |
| 250-399 | 90 | 20.6 | 29,060 | 6.0 | 57 | 15.5 | 18,621 | 3.9 | 56 | 15.3 | 18,468 | 3.8 |
| 400-599 | 94 | 21.5 | 46,544 | 9.6 | 73 | 19.9 | 37,261 | 7.7 | 70 | 19.2 | 35,757 | 7.4 |
| 600-999 | 97 | 22.2 | 72,595 | 15.0 | 95 | 25.9 | 71,979 | 14.9 | 93 | 25.5 | 69,486 | 14.3 |
| 1,000-2,499 | 72 | 16.5 | 109,551 | 22.6 | 81 | 22.1 | 124,012 | 25.7 | 82 | 22.5 | 123,738 | 25.5 |
| 2,500-7,499 | 24 | 5.5 | 95,189 | 19.6 | 22 | 6.0 | 94,279 | 19.5 | 23 | 6.3 | 98,549 | 20.3 |
| 7,500+ | 8 | 1.8 | 122,269 | 25.5 | 9 | 2.5 | 131,511 | 27.2 | 9 | 2.5 | 130,989 | 27.0 |
| State | 437 | 100 | 435,332 | 100 | 367 | 100 | 483,335 | 100 | 365 | 100 | 485,011 | 100 |

Source: Iowa Department of Education, Division of Financial and Information Services, Certified Enrollment Files.

Note: Totals may not add due to rounding.

The disparity in size among school districts in Iowa begs the question, “What is the ideal sized school or school district?” In fact,

In March 2005, Governor Vilsack and a committee of 12 legislators endorsed a set of proposals intended to make Iowa’s public schools more efficient and improve student achievement. Among the proposals was one calling for an education commission that would recommend to the 2007 Legislature a minimum school district and high school size (Johnson, 2006, p. 1).

Furthermore, “In January 2003, then-Iowa Department of Education Director Stilwell presented a set of rural education recommendations which included calls for reorganizing districts to ensure a minimum high school size of 200 students” (The Rural School & Community Trust, 2006). In “More Doesn’t Mean Better,” Johnson did note that the reasons given by Stilwell for promoting reorganization were to improve academic performance, not economic in nature, stating “The state’s findings with regard to small districts and fiscal efficiency are consistent with other research suggesting that consolidation is not likely to save much money in Iowa” (Johnson, 2006, p. 1).

On the other hand, Bard, Cardener, and Wieland would suggest that there is no ideal size for schools or districts.

Size does not guarantee success - effective schools come in all sizes. Small districts have higher achievement, affective and social outcomes. The larger a district becomes, the more resources are devoted to secondary or non-essential activities. After a school closure, out migration, population decline, and neighborhood deterioration are set in motion, and support for public education diminishes. There is no solid foundation for the belief that eliminating school districts will improve education, enhance cost-effectiveness or promote equality. Students from low income areas have better achievement in small schools. (Bard, Gardener, & Wieland, 2005, p. 12)

Johnson would concur, as will be discussed in the case against reorganization in Chapter 2.

Purpose of Study

In a time of rising per pupil costs and declining enrollments (and thus decreasing budget resources), school districts have begun pondering the options before them to best educate the students of their communities. One option very small to medium sized districts may consider is reorganization with another similarly sized district or a larger district. Indeed, a number of districts have begun laying the groundwork for reorganization with neighboring districts. Unfortunately, studies of the factors leading to a successful consolidation are rare. Bard, Cardener, and Wieland, state, "Studies on planning for consolidation are scarce, and deal mainly with planning from an administrator's point of view" (Bard et al., p. 5). A 1995 study of Oklahoma superintendents on school consolidation planning revealed that successful consolidation strategies that involved joint student body activities, a consolidation plan, maintaining all school sites, and community meetings designed to allow open communication were "vital to the consolidation process" (Cummins, Chance, & Steinhoff, 1997, p. 5). A 1992 case study of a school district consolidation found that lack of understanding of local culture resulted in resistance from community members about consolidation issues (Ward & Rink, 1992, as cited in Bard et al., 2005, p. 5). A study of eight communities in North Dakota that had experienced school consolidations showed that the most important factor in easing tensions of consolidation was holding public meetings (Sell, Leistritz, & Thompson, 1996 as cited in Bard et al., 2005, p. 5). In light of the paucity of studies about of successful voluntary reorganization, the researcher examined the processes by which school districts reorganized or consolidated in the state of Iowa, giving special concern to considering why some school districts have accomplished voluntary

reorganization while others have not. Specifically, the researcher sought answers and insights regarding the following questions:

- What caused school districts to voluntarily begin the reorganization process?
- What resources were available for guidance for school districts involved in reorganization?
- What resources were available to provide information for school districts involved in reorganization?
- What aspects of the reorganization process were positive or most effective in terms of the strategies used in enhancing the process for all involved?
- What aspects of the reorganization process were negative or ineffective in terms of the strategies used in enhancing the process for all involved?
- What were the unforeseen or unintended consequences of the reorganization?

It was the goal of the researcher to provide school districts considering reorganization or consolidation with a framework to aid in successful completion of this task. To this end, the researcher randomly selected reorganizations from the sixty-six districts that have consolidated in Iowa since 1988. Reorganized districts were eliminated from the study when the following occurred:

- The researcher was unable to interview all superintendents involved in the reorganization that resulted in a new district.
- The researcher was unable to interview one sitting board member from each of the original districts involved in a merger.

- The reorganization did not meet the definition of a voluntary reorganization.
- The reorganization resulted only in a name change for one district with no district boundaries being altered.
- The reorganization resulted from the dissolution of one school district, with the territory of that district being absorbed by other school districts.

Meeting any one of the above six criteria caused a district to be removed from the list of reorganizations that were considered for this study. Reorganized districts remaining in the pool of potential subjects were selected using a table of random numbers (Fraenkel and Wallen, Appendix A).

Definition of Terms

Area Education Agency (AEA): An organization that exists to provide schools and school districts with assistance in a wide range of venues including: technology, staff development, special education, and guidance for teachers and administrators.

Barker Guidelines: Guidelines for school building closure. The guidelines were laid down by the State Board of Education in the Case of Norman Barker, et al. in 1977. The guidelines were reviewed and approved by the Iowa Supreme Court in Keeler v. Iowa Bd. of Public Inst. in 1983.

Bounded System: A case that is being studied which is bounded by time and place (Creswell, 1998 p. 61).

Case: A program, an event, an activity, or individuals (Creswell, 1998 p. 61).

Case Study: An exploration of a “bounded system” or a case (or multiple cases) over time through detailed, in-depth data collection involving multiple sources of information in rich context (Creswell, 1998 p. 61).

Certified Enrollment: Aggregate of students a school district may count as attendees in grades Kindergarten through twelve. Students receiving special services are “weighted,” therefore certified enrollment may indicate fractions of students enrolled in a school district.

Coding: The process of developing categories to sort data (Bogdan & Biklen, 2003, p.28).

Coding Categories: Terms and phrases developed to be used to sort and analyze qualitative data (Bogdan & Biklen, 2003, p.28).

Consolidation: The combining of two or more school districts. This merger or reorganization may form a new district with a new name, or it may merge two districts with one district keeping its name and the other ceasing to exist. In either case the former legal entities are no more and are replaced by a new school corporation. Sometimes used synonymously with reorganization.

Count Date: The date on which certified enrollment is determined in the State of Iowa. During the time period covered in this study, the date on which school districts determined their certified enrollment was the third Friday in September of a given academic year.

Dissolution: The dissolving or ending of a school district as a legal entity. Dissolved school districts in Iowa have their territory absorbed by one or more neighboring districts.

District size: For the purposes of this study the researcher divided the districts in Iowa into three categories based on their 2004 certified enrollment in grades kindergarten through twelve. These categories were:

- 1) Medium: Triple section district, having three classrooms per grade level in the elementary school(s).
- 2) Small: Double section district, having two classrooms per grade level in the elementary school(s).
- 3) Very Small: Single section district, having one classroom per grade level in the elementary school.

Larger school districts, or quadruple section or larger districts, with elementary enrollments requiring four or more classrooms per grade level generally did not reorganize. A larger district involved in reorganization usually did so to absorb a smaller district. Larger districts absorbing smaller districts were included in this study.

Effective Date of Change: The date on which the reorganization of one or more school corporations becomes official. As established by The *Code of Iowa* the effective date of change is "July 1 following the date of the reorganization election held pursuant to section 275.18 if the election was held by the prior November 30. Otherwise the change shall take effect on July 1 one year later."

Involuntary Merger: Reorganization in which at least one school district involved in the reorganization was ordered to do so by the State of Iowa.

Multicase Study: A case study involving two or more subjects, settings or depositories of data, (Bogdan & Biklen, 2003, p. 62). A multicase study is similar to a multisite study.

Multisite Study: A study in which several sites have been selected for study (Creswell, 1998, p. 61). A multisite study is similar to multicase study.

Name Change: This occurs when a school district changes its legal name, but neither loses or acquires territory. There are no changes to district boundaries as a result of the name change.

New School District: The school district formed by the reorganization of two or more original school districts.

Original School Districts: Those school districts that reorganized to form a new school district.

Reorganization: The term preferred by the State of Iowa for changes to a school district's legal organizational status. The term reorganization includes merger and consolidation, involuntary merger, name change, and dissolution.

School District: A legal entity or corporation that exists to provide children with free and appropriate public education.

Voluntary Reorganization: A reorganization or consolidation in which the school districts involved merge or combine without being ordered to do so by the State of Iowa.

Research Questions

In 1997, Cummins *et al.* published a report entitled "A Model for Rural School Consolidation: Making Sense of the Inevitable Result of School Reform" (Cummins *et al.*, 1997, p. 1). This study investigated the effects of the 1989 passage of H.B. 1017 in Oklahoma. The Oklahoma Legislature encouraged the reorganization of school districts through financial incentives. Cummins sought to learn the strategies used most

effectively by school districts during the consolidation process. The Cummins study posed these questions (Cummins et al., 1997 p. 6-13):

- 1) What strategies did the superintendents who have participated in voluntary school consolidation utilize to enhance the consolidation process for teachers?
- 2) What strategies did the superintendents who have participated in voluntary school consolidation utilize to enhance the consolidation process for parents and the community?
- 3) What strategies did the superintendents who have participated in voluntary school consolidation utilize to enhance the consolidation process for the students?
- 4) What strategies did the superintendents who have participated in voluntary school consolidation utilize to enhance the consolidation process for the support staff?
- 5) What strategies did the superintendents who have participated in voluntary school consolidating utilize to enhance the consolidation process for the administrators?
- 6) What strategies did the superintendents who have participated in voluntary school consolidation utilize to enhance the consolidation process for the board members?
- 7) What strategies for voluntary consolidation were not productive?

Using the Cummins study as a model, the researcher sought to determine the actions taken by Iowa school districts that voluntarily reorganized. To determine these

actions, the researcher asked superintendents and board members who were involved in a voluntary reorganization the following questions:

- 1) What primary factor(s) caused your district to consider reorganization?
- 2) Did your district use the services of an out of district consultant in the reorganization? If so, describe the role of the consultant in the reorganization of your district.
- 3) What strategies utilized proved to be most productive and non-productive?
- 4) Were there unintended consequences of your district's reorganization?

Chapter 2

REVIEW OF THE LITERATURE

Nationwide School District Data

School district reorganization and the controversies and problems associated with consolidation are not unique to Iowa.

Since 2000, Arizona, Arkansas, California, Montana, Nebraska, South Dakota and Virginia have all enacted policies related to district consolidation, according to the National Conference of State Legislatures. News reports suggest that Maine, Illinois and Iowa are also places where consolidation remains an issue. (Russo, 2006, p. 11)

The potential for consolidation varies widely from state to state. According to Alsbury, Texas has the most school districts with 1,040, Hawaii has the fewest school districts with one, and New York has the greatest number of students with 1 million (NCES, 2001, as cited in Alsbury, 2005, p. 8).

Alsbury also noted the following U.S. District Enrollment Records.

- Mean enrollment of 3,210 students.
- 50% of school districts serve fewer than 1,033 students.
- 90% of school districts have an enrollment of fewer than 6,200.
- 463 one-teacher schools exist in the nation. (NCES, 2001, as cited in Alsbury, 2005, p. 9).

History of School District Reorganization in the United States

During the mid 1800s school reformers promoted consolidation as a means to improve the education provided to students (Potter, 1987, as cited in Bard et al., 2005, p.

1). The state of Massachusetts passed legislation in 1869 providing free public transportation to students (Bard et al., 2005, p. 1). The Industrial Revolution spawned the invention of the automobile and improved road surfaces, lessening travel time and thus allowing for consolidation of some small rural schools (Bard et al., 2005, p. 1).

Businesses were often promoters of consolidation as evidenced by the work of the International Harvester Company in the 1930s to sell their new line of school busses (White, 1981, as cited in Bard et al., 2005, p. 2). The Industrial Revolution, in conjunction with the Agricultural Revolution of the eighteenth, nineteenth, and early twentieth centuries prompted an influx of formerly rural laborers to the cities. Growing cities led to larger school districts in those cities. As city school districts began to adopt a more centralized system for providing education, school reformers and policy makers promoted modeling all school districts after the urban districts (Kay, Hargood, & Russel, 1982, as cited Bard et al., 2005, p. 1).

Alsbury and Shaw (2005) state:

(During) the depression years of the 1930s, district consolidation was in full force as a nationwide trend with the number of districts reduced from 200,000 to 30,000. Consolidation appeared to be the remedy for all stakeholders, reformer and rural resident alike, to assure equity, efficiency, and consistency aimed toward the pursuit of happiness and the good life of democracy. (p. 106)

Educators and sociologists of the day (Smith, 1938, as cited in Alsbury & Shaw, 2005, pp. 106-107) agreed that:

- 1) Consolidated districts provided a natural social center for communities and fostered the education of adults.

- 2) Consolidated districts provided more efficient, economical, and well equipped staff, facilities, resources, and transportation.
- 3) Consolidated districts provided a better academic and social education for students by offering a broadened program of studies and activities, as well as a widened acquaintance group with wholesome competition.

The number of school districts nationwide dwindled while the number of students per school and school district has risen in recent decades. Heinz showed the decline in the number of school districts in the United States (table 4) in "The real and perceived social and economic impact of school consolidation on host and vacated communities in Nebraska" (Heinz, 2005, p. 15).

Table 4

Decline in Number of School Districts Nationwide, 1931-1982

| <u>Year</u> | <u>Number of school districts</u> | <u>Decline (%)</u> |
|-------------|-----------------------------------|--------------------|
| 1931-32 | 127,531 | |
| 1941-42 | 115,493 | 10% |
| 1951-52 | 71,094 | 45% |
| 1961-62 | 35,676 | 73% |
| 1971-72 | 17,995 | 86% |
| 1981-82 | 15,912 | 88% |

Furthermore, "since 1940 the size of the average U.S. school district has risen from 217 to 2,627 [students], and the size of the average school has risen from 127 to 653"

(Walberg, 1994; Ehrich, 2001, as cited in Bingler et al., 2002, p. 3). Bard et al. also noted that the political climate during the middle of the 20th century prompted school district reorganization. Fear among the public and members of government that small schools were ineffective in developing students able to successfully compete with the Soviet Union (Ravitch, 1983, as in Bard et al., 2005, p. 2) and a prevailing assumption that bigger is better (Theobald, 2002, as in Bard et al., 2005, p. 4) fueled consolidation efforts.

Currently, school district consolidation seems to be motivated by several factors. Local school boards are sometimes looking for ways to strengthen curriculum and/or increase extra-curricular offerings. Legislators often see reorganization of school districts as a way to save scarce and valuable state funds. To that end, state governments sometimes provide incentives (Alsbury, 2005, p. 23) that include:

- Multi-year incentive pay to school districts involved in reorganization.
- Early retirement incentives for staff and faculty of school districts that consolidate.
- Tax rate equalization for property owners and those subject to income surtaxes in merged school districts.
- Required merger of school districts.

Yet local school boards rarely consolidate willingly (Russo, 2006, p. 12). In a nationwide study of 47 states, Alsbury found that between 1965 and 2003 thirteen states experienced no consolidations and 22 states had fewer than 10. However between 1994 and 2003 nine states had 10 or more reorganizations (NCES, 2001, as cited in Alsbury, 2005, p. 14). These states were California, Illinois, Iowa, Minnesota, Montana, Nebraska, North Dakota, Oklahoma, and Oregon. In this nine-year span Nebraska had the largest

number of consolidations with 174, although Oklahoma had experienced a staggering 781 mergers since 1965 (Alsbury, 2005, p 13).

History of School District Reorganization in Iowa

The Iowa Department of Education tracked consolidations and reorganizations of school districts in the state for some time. According to a report on the Iowa Department of Education website, at the beginning of the 1900s Iowa had 4,873 public school districts. The Consolidated School Law of 1906 was intended to spawn a large number of consolidations. However in the four years following passage of this law only 10 consolidations had occurred. In 1922, 4,839 school districts were in operation in Iowa, and in 1953, 4,558 districts still existed. Consolidations continued, and in 1953 the General Assembly passed legislation that encouraged school districts to consolidate. On July 1, 1965, there were 458 school districts in Iowa. In that year the legislature required that all school districts maintain a high school. As a result 30 districts reorganized between July 1, 1966, and July 1, 1980. In subsequent years, 25 districts either consolidated or dissolved from 1980 to 1990 and 26 districts reorganized, dissolved, or were involuntarily merged by the state between 1990 and 2005. As of July 1, 2005, Iowa had 365 public school districts (Iowa Department of Education, 2005).

The *Code of Iowa* addresses the issue of reorganization in sections 274 and 275. The researcher included pertinent excerpts from sections 274 and 275 of the *Code of Iowa* in Appendix A to clarify the legal requirements for school district reorganization.

The Case in Favor of Reorganization

School district consolidation has continued to be a highly charged political issue in Iowa in the 21st century. Seemingly everyone, from the average person on the street to

the governor of the state, has an opinion and a plan regarding the reorganization of Iowa school systems. In 2005, Iowa Governor Vilsack and a select group of twelve legislators endorsed “far-reaching –and controversial- educational proposals” (Jerousek & Roos, 2005, p. 1A). These proposals included:

- Establishing an education commission that would recommend to the 2007 Legislature a minimum size for school districts and high schools.
- Encouraging all districts to set higher performance standards for students by adjusting graduation requirements and creating more opportunities to take advanced courses.
- Requiring districts of all sizes to collaborate on ways to become more efficient and share academic programs or business operations. (Jerousek & Roos, 2005)

State Representative Raecker agreed that school districts should share programs. While conceding that small districts in Iowa were producing students with the ability to perform well on standardized tests, Raecker indicated that small schools didn’t have the ability to offer numerous and diverse advanced placement courses, which he touted as being very important for students seeking post-secondary education opportunities (Roos & Boone, 2005 p. 1A). Raecker’s claims regarding availability of advanced placement courses were supported by the Des Moines Register article, “State, Schools Debate Curriculum” (Jerousek & Roos, 2005 p. 1A). The Register article indicated

Students are more likely to take advanced math and science classes and the nationally recognized Advanced Placement courses in larger school districts. For example just 10.3 percent of students took calculus or trigonometry classes in

districts with fewer than 250 students in 2003-04, while more than double, 22.8 percent, took advanced math in districts of 1000 to 2500, according to state data. (Jerousek & Roos, 2005)

The State of Iowa has established a program elimination commission that “would ask high school districts with fewer than 100 students or K-12 districts with fewer than 250 students to develop Quality Education Plans” (Anderson, 2003, p. 1). These plans would be used to guide such districts in ensuring that their students received a high quality education.

Conant, in a 1959 study, indicated that small high schools were a major difficulty facing education. Conant recommended graduating classes of at least 100 students in order to allow high schools to provide a curriculum best suited for college preparation (Conant as cited in Bard et al., 2005, p. 2). Nelson (1985) also espoused the advantages of consolidation as it pertains to curriculum, indicating that shared faculties and curriculum would increase class offerings and reduce the number of courses dropped due to insufficient enrollment. The national call for higher standards and accountability has also given credence to the claims of those promoting consolidation.

Consolidation proponents...suggest that students will not perform well on tests or be prepared to attend college unless they are educated in larger schools that offer more courses or an enriched curriculum. In their view, bigger is better and smaller is too expensive. (National School Boards Association, 2005, p. 2)

The argument has been made that it is fiscally more efficient, and presumably more prudent, to operate a school building at the capacity for which it was designed. Heinz (2005, p. 34) cited McGuffy and Brown (1979) in stating, “operating costs actually

increased when the number of students served became less than the maximum allowed by the design of the building". Nelson (1985, p. 1) indicated that improved economic efficiencies come for consolidated districts in the form of savings on capital improvements and maintenance costs, as well as the need for fewer teachers and administrators. Strange and Malhoit (2005, p. 2) claimed

Critics of small rural schools rest most of their case for consolidation on assumptions about economies of scale. They believe the fixed per-pupil costs to provide students with administrators, essential teachers, and decent facilities are unjustifiably high in small schools.

Finally, Nelson (1985) indicated the combined fiscal resources of consolidated school districts allowed extra-curricular programs to flourish.

The Case Against Reorganization

However, there are experts who would argue that smaller schools better serve students or that advanced placement courses are not as important as their national reputation would imply. Ehrich of Virginia Tech cited the work of Henderson to support his belief that smaller schools are better (Henderson, 1987, as cited in Ehrich, 2000, p. 1). Essentially, Henderson found that parents whose children attend smaller schools were more likely to be involved with and committed to the school. Ehrich stated,

There is remarkable consistency among the research studies that have been reported on school size; smaller is better. To understand these findings one must appreciate the pressing need of children, especially the younger ones, for structure, social stability, and community support (Ehrich, 2000, p. 1).

Ehrich implied that small schools better meet these needs. Ehrich also cites Cotton's work, *School Size, School Climate, and Student Performance* (Cotton, 1996).

According to Ehrich, Cotton presented twelve factors that were affected by school size (Cotton, 1996). These factors were as follows:

- Quality of the Curriculum And Extracurricular Participation
 - Cotton found that “a twenty-fold increase in school population leads to only a five-fold increase in participation opportunities.”
- Cost Effectiveness
 - The research considered by Cotton demonstrates the economic principle of diminishing marginal returns. If well-educated students are the desired output, faculty / staff and yet to be educated students may be considered to be inputs. The school system may be considered a method of production. As yet to be educated students are added to the system, faculty and staff must also be added. Up to a point known as the “margin,” additional inputs result in greater output at lower cost. Once the margin is crossed additional inputs result in lower cost effectiveness and may lessen the quality of the product.
- Academic Achievement
 - According to Cotton, some studies find no correlation between increased school size and level of academic achievement. Indeed, some studies indicated student achievement “in small schools is at least equal - and often superior - to student achievement in large schools.”

- Student Attitudes
 - Cotton's research "indicates that the attitudes of low --SES and minority students are especially sensitive to school size and benefit greatly from attending small schools."
- Social Behavior
 - "Cotton indicates that increased social problems associated with increasing the size of the student population negate advantages created by increasing school size."
- Attendance
 - Students in small schools have higher attendance rates. Furthermore, "students who change from large schools to small... generally exhibit improvements in attendance."
- Dropouts
 - "Small schools show higher graduation rates and lower dropout rates."
- Belongingness / Alienation
 - "Small schools provide opportunity to experience a feeling of belongingness through participation in co-curricular activities. According to Cotton, 'student alienation and student participation in co-curricular activities have been found to be negatively correlated.'"
- Self-Concept
 - "Numerous researchers have found small schools have a positive impact on self-image."
- Interpersonal Relations

- “Cotton lists a number of studies that indicate correlation between small school size and positive interpersonal relationships while finding no research indicating equal or superior relationships in large schools.”
- Teacher Attitudes
 - “There is less research on school size in relation to teacher or administrator variables, but what there is favor smaller schools.”
(Ehrich, 2000, pp. 2-3)

There is a segment of the population that believes the standards and accountability movement necessitates the consolidation of school districts. These proponents of reorganization feel standardized test scores will be lower among students in smaller school districts and coincidentally small school students will be ill-prepared for college level work, due to the perceived ability of larger schools to “offer more courses or an enriched curriculum” (National School Boards Association, 2005, p. 2).

From one perspective, ways to enhance a school district curriculum or offer more courses may include offering advanced placement courses. However, Daggett might question the importance of advanced placement courses. In a presentation at Grant Wood Area Education Agency (April 27, 2005), Daggett commented, “the top 30 high schools in the nation are moving away from offering advanced placement courses” (Daggett, 2005). Daggett indicated the schools found that their resources were better spent in sending students to community colleges for dual enrollment classes.

Opponents of consolidation point out the lack of current research favoring large schools over small schools. Researcher Gregory from Indiana University points out that over 30 years have passed since the last study recommended large schools; nevertheless,

districts have continued to build them (Gregory, 2000, as cited in Bingle et al., 2002, p. 6). Research about the value of small schools shows that small schools are safer schools and better places for students to work with adults who know them and whom they trust (Barker & Gump, 1964; Wasley, 2000; Cotton, 2001, as cited in Bingle et al., 2002, p. 8).

Consolidation opponents point toward higher incidences of crime in large schools versus small schools as one reason not to form larger schools and districts. For example:

Comparing small schools (fewer than 300) with big schools (1,000) or more, this report shows that big schools have higher rates of violent crime, vandalism, fights, robberies, and weapons incidents (Source: U.S. Department of Education, 1999, as cited in Bingle et al., 2002, pp. 9-10).

Large school detractors note increased bureaucracy and increased isolation of teaching staff, and lessened collegiality as negative results of consolidation. According to Nelson:

Opponents of school consolidation cite the following reasons against consolidation: more red tape, less participation in decision-making by teachers and administrators, more tension between teachers and students, fewer situations for bringing about change, more time, effort, and money devoted to discipline problems, less parent-teacher involvement, and less human contact, producing frustration and alienation and weakening morale of both students and school staff (Nelson, 1985, p. 42).

Reorganization opponents also contend the common belief that larger schools are more economically efficient is not correct.

One of the major arguments for consolidation is that a larger school can be run more efficiently. Much research, however, has reached the conclusion that this is not necessarily the case. There is actually very little evidence to support the belief that larger schools and districts achieve cost savings. In the late 1950s, Hirsh (1960) conducted one of the first nationally recognized studies that concluded that larger school districts were not necessarily more financially efficient than smaller school districts. (Streifel, Foldesey, & Holman, 1991, as cited in Heinz, 2005, p. 35)

Also, "the strategy of using consolidation to achieve savings is not very promising, according to recent research, especially where schools are necessarily small (as in rural areas)" (Howley, 1993, as cited in Heinz, 2005, p. 35). Furthermore, "two studies in the collection challenged the myth that economies of scale resulted from reorganization" (as cited in Tholkes & Sederberg, 1990, p. 13, as cited in Heinz, 2005, p. 35).

They alleged that only in cases where there was a compact geographical area and dilapidated existing facilities could any economies of scale be expected.

Otherwise, transportation, distribution, higher salary, and new-construction costs would cancel the savings realized from increased purchasing power and from more efficient use of facilities, equipment, and personnel. Sher and Tompkins concluded that economies of scale had been overstated as a benefit of reorganization. (as cited in Tholkes & Sederberg, 1990, p. 13, as cited in Heinz, 2005, p. 35)

In a 2006 study of achievement levels among Iowa students in large schools with numerous course offerings and small schools with fewer course offerings, Johnson asked:

1. In what ways and to what extent does student academic achievement vary among Iowa school districts of varying enrollment size?
2. In what ways and to what extent does the number of high school course units impact academic achievement in Iowa school districts?

Johnson's findings indicated that:

- Smaller school districts do not exhibit lower levels of academic achievement than larger districts.
- The number of high school credits offered bears no rational relationship to student achievement levels.
- A strategy of consolidating districts to create larger high schools offering more credits is not likely to raise student achievement levels.
- A strategy of consolidating districts to create larger high schools is likely to magnify the negative effects of poverty on academic performance, widening achievement gaps between rich and poor students.

Based on his findings, Johnson concluded,

Consolidating Iowa's smaller districts would not contribute to improvements in student achievement. On the contrary, smaller school districts should be an important part of any Iowa strategy to improve student achievement where it is weak and to sustain it where it is strong. They should be recognized as an

educational value and intentionally supported within the state's system of public education (Johnson, 2006, p. 11).

The Impact of Reorganization

In their 2005 study, "Policy implications for social justice in school district consolidation (Alsbury & Shaw, 2005), Alsbury and Shaw found the following positive impacts of reorganization:

- 1) Broadened and enriched curriculum and programs
- 2) Increased offerings of activities and greater student competition
- 3) Expanded socioeconomic and racial diversity
- 4) Enhanced student awareness and understanding of other viewpoints as two student groups with unique community norms and values were combined
- 5) Improved and more flexible services for special needs and gifted students
- 6) Greater support resources and counseling services for at-risk students
- 7) Improved funding district wide
- 8) Staff could specialize and had fewer preparations
- 9) Schedules were flexible
- 10) Amicable reorganization of school boards
- 11) Perceived higher overall quality of education for students (Alsbury & Shaw, p. 113)

In the same study, Alsbury and Shaw also found that superintendents identified these negative impacts of consolidation:

- 1) Perceived lack of representation on the part of the merging community when the school board was dissolved or changed

- 2) A hastened exodus of residents and businesses from communities that experienced a school closure
- 3) A loss of administrative positions
- 4) A lingering sense of animosity from the community and parents
- 5) A fear from the parents of the merging/closing school that they, their children, and their community values and identity would be marginalized, become invisible, and lose personal attention (Alsbury & Shaw, p. 113).

Heinz (2005) studied nine communities in Nebraska in which consolidation had occurred. The Heinz study considered the following indicators of the impact of consolidation on the communities involved: "population, per capita income, retail sales, number of retail businesses, pull factor, property taxes, and property valuations" (p. 3). Heinz found that only per capita income saw significant change, and that change was an actual increase in per capita income. Therefore Heinz concluded, "the overall perception of those involved in a consolidation, is that any decline in their community was already happening prior to the consolidation, and that it was due to factors other than consolidation."

Another question that may arise is at what point does a high school become too small to serve its students? Abramson concluded that the size of a high school is not the question. Rather the question is, "how does the school operate? If a small school operates in the lock-step fashion of its larger counterparts, it will be unsuccessful. Small schools must adapt and find new ways to meet the needs of their students" (Abramson, 2005, p. 1).

Chapter 3

METHODOLOGY

Statement of the Problem

As student numbers in rural areas dwindle, so too will state funding for rural school districts. Some proponents of reorganization have cited economies of scale as a reason to consolidate, while others have indicated lessened ability to offer a varied curriculum and other instructional considerations as the primary motivation for merging school districts. Currently Iowa school districts have the option to participate in a budget guarantee program. The purpose of this program is to prevent school budgets from dropping rapidly as a result of declining enrollment. However, it is still possible for a school to show a loss in revenue from the state funding formula due to a decline in enrollment. Furthermore, the budget guarantee program is scheduled to end in 2014.

The question of whether reorganization should be pursued was not the purpose of this study. Rather, the researcher sought to determine what two or more school districts should do to facilitate the merging of their respective districts, once the decision to consolidate has been made. For the purposes of this study, a voluntary reorganization was considered to be one in which two or more districts have, of their own volition, combined to become one district.

Participants

Since July 1, 1988, sixty-six reorganizations involving 133 school districts have taken place. This did not include two dissolutions (Iowa Department of Education, 2005). The researcher studied six randomly selected consolidated districts. The researcher interviewed all superintendents and one board member from each of the 12 districts

involved in the six mergers. Identities of participants and their respective school districts were protected through the use of pseudonyms.

Instrumentation

Four research questions were investigated:

- 1) What primary factor(s) caused your district to consider reorganization?
- 2) Did your district use the services of an out of district consultant in the reorganization? If so, describe the role of the consultant in the reorganization of your district.
- 3) What strategies proved to be most productive and non-productive?
- 4) Were there unintended consequences of your district's reorganization?

Through the use of on-site interviews the researcher collected responses to these questions. Data were coded and analyzed to look for common threads in the strategies used or not used by school districts that voluntarily reorganized.

Design

This study was qualitative in its design. Qualitative research is "an approach to social science research that emphasizes collecting descriptive data in natural settings, uses inductive thinking, and emphasizes understanding the subjects' point of view," (Bogdan & Biklen, 2003, p. 261). Furthermore, this study was a multicase study involving "two or more subjects, settings or depositories of data," (Bogdan & Biklen, 2003, p. 62).

For purposes of this study, the researcher considered reorganizations that had taken place in Iowa beginning with the 1988-89 academic year. Superintendents and one board member from each district involved in a given reorganization that were both

available for interview and willing to share their experience were interviewed. The 1988-89 academic year was chosen as the beginning date for this study because the researcher anticipated that going back in excess of 20 years for information would lead to great difficulty in finding superintendents and board members who would be willing and available to discuss their part in the reorganization process for their school district. Table 4 (p. 47) from the Iowa Department of Education depicts the reorganizations of Iowa school districts that have occurred since July 1, 1988.

Procedures

This study utilized semistructured interviews to gather information from eight superintendents and twelve board members involved in six successful consolidations. The research questions served as a guide, but the researcher allowed for flexibility in each interview. Flexibility was built into the interviews in order to permit the subjects to expand their answers to the open ended questions as they saw fit. This was done so that the researcher would not prejudice the subject's answers. As in the study of Oklahoma consolidations by Cummins et al., the researcher contrasted and compared the data from the superintendents in each district involved in the consolidation. Other sources of data included researchers' notes, newspaper articles, and feasibility studies (Cummins et al., 1997, p. 5). All superintendents, board members and school districts in the study were guaranteed anonymity through the use of fictitious names and the study of a random sample of the reorganizations that occurred between July 1, 1986, and July 1, 2006.

Since July 1, 1988, sixty-six reorganizations involving 133 school districts have taken place. This does not include two dissolutions (Iowa Department of Education, 2005). The researcher assigned each of the reorganizations a number ranging from one to

sixty-six, with the oldest consolidation being given the number one, the second oldest being assigned the number two and so on up to the most recent merger which was assigned the number sixty-six. Reorganizations occurring in the same year were arranged in alphabetical order. The researcher then used a table of random numbers to order the school districts for consideration for this study. The researcher contacted representatives of the first ten school districts as ordered by the table of random numbers. Of these ten districts, four were eliminated from consideration, three districts because one of the superintendents involved was deceased and one district because one of the superintendents involved could not be located. Of the remaining six districts of the first ten school districts as ordered by the table of random numbers the researcher was able to contact all the superintendents and one board member from each district involved in the merger.

To strengthen the validity of the interview questions, the researcher sent questions to a university professor for evaluation of content and construction (Cummins et al., 1997, p. 7). The researcher also conducted a pilot study, to include taping and transcription, with a superintendent not involved in the actual study.

Data Collection

The researcher collected data from a variety of sources. One source of data was documentation that included news reports, board meeting minutes, feasibility studies, AEA recommendations, Iowa Department of Education documents, and notes. A second source of data was interviews of individuals who participated in a voluntary reorganization, specifically superintendents and board members. All interviewees signed a consent form that received prior approval by the Drake University Institutional Review

Board. The researcher clarified the purpose of the study and the rights of the interviewee prior to securing signed permission and conducting the formal interview with participants. The researcher selected interviewees based upon a random selection process in order to ensure a sample as representative and unbiased as possible. This process involved assigning each district a number and then arranging the districts by using a table of random numbers. The researcher contacted districts based on their order as determined by the table of random numbers. Contacts ceased once six reorganized districts for which all superintendents and one board member from each original district agreed to be interviewed. All interviews were tape recorded and transcribed verbatim for accuracy. Pseudonyms were used for each participant, school district, and community.

The distribution of interview subjects is depicted in Table 5.

Table 5

School Districts Involved in the Study

| Reorganized district | Original district | Superintendent / board |
|--|-------------------|-----------------------------|
| | | Member |
| Reorganization One: Fairview School District | Fairburn-Griffin | Superintendent Jim Williams |
| Fairview School District | Fairburn-Griffin | Board Member David Moore |
| Fairview School District | Hiram | Superintendent Bill Wilson |
| Fairview School District | Hiram | Board Member Mike Miller |

continued

Table 5, cont'd

| Reorganized district | Original district | Superintendent / board |
|--|----------------------------------|---------------------------------|
| | | Member |
| Reorganization Two: Shady Grove School District | Athens and Brunswick | Superintendent Dr. Ted Adams |
| Shady Grove School District | Athens | Board Member Steve Thompson |
| Shady Grove School District | Brunswick | Board Member Brian Martin |
| Reorganization Three: Oak Grove School District | Jasper | Superintendent Dr. Mary Johnson |
| Oak Grove School District | Jasper | Board Member Charles Taylor |
| Oak Grove School District | Lithonia | Superintendent Tony Robinson |
| Oak Grove School District | Lithonia | Board Member Matt Lewis |
| Reorganization Four: Maple Grove School District | Conyers and Duluth | Superintendent Dr. Tim Walker |
| Maple Grove School District | Conyers | Board Member Kevin Clark |
| Maple Grove Community School District | Duluth | Board Member Rich Wright |
| Reorganization Five: New Hope School District | Sparta-Oconee and Toccoa-Zebulon | Superintendent Mark Jackson |
| New Hope School District | Sparta-Oconee | Board Member Paul Thomas |
| New Hope School District | Toccoa-Zebulon | Board Member George Lee |
| Reorganization Six: Liberty School District | Marietta and Norcross | Superintendent Patricia Jones |
| Liberty School District | Marietta | Board Member John Green |
| Liberty School District | Norcross | Board Member Linda Davis |

Interview Participants

Jim Williams. Williams is the former superintendent of the Fairburn-Griffin school district. He is now retired and lives in Mount Zion, Iowa. The interview was conducted at locally owned restaurant in Mount Zion. It was a cool spring evening with a bit of a chill in the air. The din of the other restaurant patrons, while sometimes quite loud, did not prove to be a distraction. Williams was quite interested in the topic of this study.

David Moore. Moore is a successful farmer who lives outside of Fairburn, Iowa. He had previously served as a member of the Fairburn-Griffin school board. Travel to the Moore farm on the day of the interview was made more difficult by a snowstorm. The interview took place over steaming cups of strong, black coffee in the Moore dining room. Moore seemed a bit nervous about the interview process. Post interview conversation centered on Moore's Corvette, which was parked in the garage.

Bill Wilson. Wilson is the retired superintendent of the Hiram Community School District. The interview took place in the dining room of Wilson retirement home in Pine Grove, Iowa, a resort community located along the shore of a large lake. Wilson is an elderly man, and quite a storyteller. As a result, sometimes he would digress from the task at hand.

Mike Miller. Miller is a former board member for both the Hiram and Fairview Community School Districts. He is an undertaker by trade. Miller was on call the day of the interview, therefore the interview was conducted in the funeral home located in Sunnyside, Iowa. The interview took place in a former dining room that had been

WILLIAM
LIBRARY

converted into a conference room. The interview was interrupted once when Miller needed to take a phone call concerning a business matter.

Dr. Ted Adams. The interview with Dr. Adams occurred in the Superintendent's office at the Shady Grove Elementary School. Adams had been superintendent of both the Athens Community School District and the Brunswick Community School District before their reorganization into the Shady Grove School District. Post-interview discussion focused on the success of the Shady Grove Varsity Golf Team following the merger.

Steve Thompson. Thompson was a board member for the Athens Community School District during the consolidation. The interview took place in the Rockdale County Court House office of Thompson. The courthouse was undergoing renovation, making the route to Thompson's office a noisy and dusty walk. Thompson was excited to share his views regarding the reorganization process.

Brian Martin. Martin served on the Brunswick Community School District board. The interview occurred in the living room of Martin's rural Brunswick farmhouse. Martin, while cordial and pleasant, seemed a bit daunted by the interview process.

Dr. Mary Johnson. Johnson was superintendent at the Jasper school district during their merger with the Lithonia district. Johnson has since retired from educational administration and now operates a successful business in Honey Creek, Iowa. The interview took place in Johnson's office. The office looked and felt as if it belonged to a very busy person. Papers were in piles around the room. Notes were stuck to the wall to remind Johnson of appointments and commitments. This interview was the lengthiest of

the study as Johnson truly enjoyed reminiscing and telling stories about her days as an administrator.

Charles Taylor. The interviewer met Taylor in his tidy, well-kept home in Jasper, Iowa. Taylor was a member of the Jasper school board. The interview took place in the Taylor dining room. Taylor's wife was working in the kitchen and speaking to someone on the telephone during the interview, but this did not prove to be a distraction. In fact, Taylor's wife was interested in the topic and seemed disappointed to be excluded from the interview.

Tony Robinson. Robinson was the superintendent of the Lithonia district. Robinson preferred to be interviewed at a national chain restaurant in Loganville, Iowa. The restaurant was quite noisy, detracting from the quality of the interview. While Robinson was a willing participant in the interview, he harbored some ill-feelings about the outcome of the reorganization process, which was evident in his answers.

Matt Lewis. Lewis is a retired gentleman living in Lithonia, Iowa. The interviewer arrived at the Lewis home at the appointed time, interrupting a visit by Lewis's sister and her husband. When Lewis's sister left, the interview began in the dining room. Lewis was another wonderful storyteller, which led to a good deal of time off-task.

Dr. Tim Walker. Walker was superintendent of both the Conyers Community School District and the Duluth Community School District during their reorganization as the Maple Grove Community School District. Walker has long since retired, and at the time of the interview was in the process of selling his home in rural Tallulah, Iowa, in order to move to a southern state. The researcher was fortunate to be able to reach Walker during a two week window of time when Walker was in Iowa. The Walker home is

located down a tree-lined winding lane on the southern bank of the Tallulah River. The interview occurred in the Walker dining room, which was obviously in the midst of being packed for moving.

Kevin Clark. Clark is a former board member of the Conyers Community School District. A farmer, Clark was in the process of building a new home in the heart of a timber he owned. Clark had done most of the work on the home himself, and was rightfully proud of his efforts. The home had an expansive feel while retaining a rustic air. The interview took place on a rough-hewn pine table in the nearly finished dining room of the new Clark home.

Rich Wright. Wright is an employee of River Carron Albumen in Conyers, Iowa. The interview took place in the board room of the River Carron Albumen office. A display showed the products of a number of companies that use River Carron Albumen products as an additive. Many of these products are sold on a global basis. Wright took the time to explain to the researcher the history of River Carron Albumen and discussed the multitude of uses for the company's products. Wright had been a board member of the Duluth school district during the time of the consolidation with Conyers to form the Maple Grove Community School District.

Mark Jackson. Jackson was superintendent of the Sparta-Oconee school district and the Toccoa-Zebulon school district when they merged to form New Hope Community School District. He is now superintendent of the Milstead Community School District in Milstead, Iowa. The interview took place in Jackson's office. The outer office was full of activity and Jackson's office was located below a well travelled passageway. Therefore it was quite noisy in the room. While the researcher experienced

distraction caused by the commotion, Jackson, if he noticed the ruckus, did not seem to mind.

Paul Thomas. Thomas was a board member for the Sparta-Oconee school district. He operates a museum in Oconee. The interviewer met Thomas at the museum. The interview took place in Thomas's office which was decorated with items pertinent to the mission of and displays in the museum. Thomas was excited to discuss the formation of the New Hope Community School District, but was also saddened that passionate disagreement still existed regarding the reorganization process. When Thomas talked about the ongoing dissonance in his community resulting from the merger of school districts, there was a change in demeanor. The tone of his voice lowered and he spoke more softly. At the end of the interview, Thomas gave the researcher a personal guided tour of the museum.

George Lee. Lee lives on an acreage in rural Sparta, Iowa. He was a member of the Toccoa-Zebulon school board before the reorganization with Sparta-Oconee that begat the New Hope Community School District. The interview took place in the dining room of the Lee home. Lee is an employee of the United States government and farms on a part-time basis. While not profane, Lee peppered his answers with terms and phrases from the vernacular.

Patricia Jones. Jones was the superintendent of both the Marietta Community School District and the Norcross Community School District as they reorganized to form the Liberty Community School District. The interview occurred in the school library as Jones was covering a class. Jones made it clear that she was responsible for the students and they might need to interrupt the interview from time to time. While these

interruptions did occur, they did not detract from the interview process in any way. Jones was cooperative and very professional in her actions.

John Green. Green was a member of the Marietta board during the consolidation. On the scheduled day of the interview, Green phoned the researcher and asked to reschedule for later in the day due to a medical emergency in the Green family. The researcher agreed. Fortunately, the medical crisis subsided, and the rescheduled interview took place in the break room of Zingara Industries in Marietta, Iowa. Green is an employee of Zingara Industries.

Linda Davis. Davis had served on the Norcross school board. Davis agreed to meet the researcher in the Iowa Communications Network (ICN) classroom of Liberty High School. She was visibly anxious about being interviewed. Davis possessed a strong understanding of the reorganization process and recounted her experiences in an articulate fashion.

Data Analysis

Bogdan & Biklen suggest that during and after data collection the researcher develop a list of coding categories to aid in data analysis. The researcher used codes and coding categories to compile data gathered from multiple sources regarding school districts that had successfully reorganized voluntarily. These data were analyzed through in-depth description in search of themes and commonalities among the school districts that voluntarily engaged in the reorganization process (Creswell, 1998).

Strengths of the Study

By conducting a pilot study with a superintendent not involved in the study, and by sending the study questions to a university professor well versed in qualitative

research, the researcher intended to strengthen the interview questions in regard to clarity, appropriateness, and validity. The researcher conducted a multicase study, in which numerous participants from multiple reorganization efforts were questioned. The research may also be considered a multisite study as individuals from more than one school district were interviewed. The cases involved were randomly selected from a list of reorganizations that have occurred in Iowa since 1986; thereby including many recent consolidations while excluding data from more distant reorganizations that may not be pertinent to districts considering consolidation in the near future. Also, the use of in-depth study and a process for coding data further strengthened the study.

Limitations of the Study

This study was limited to Iowa school districts that voluntarily reorganized during the eighteen-year period between 1986 and 2006. Further parameters were established, including:

- Only reorganizations that occurred during the aforementioned twenty-year time frame were included in the study.
- Only those reorganizations where all superintendents and at least one board member from each district involved were included in the study.

Chapter 4

FINDINGS

Introduction

This study collected data from six school district reorganizations using semistructured interviews to gather information from eight superintendents and twelve board members involved in six successful consolidations. Eight superintendents were interviewed since in four of the reorganizations the districts involved shared the same superintendent prior to the consolidation. Twelve board members were interviewed, with one board member from each of the original districts involved in the reorganization process being included. All interview subjects were guaranteed anonymity through the use of fictitious names for people, school districts, and communities.

Summary of Findings

Question One: What primary factor(s) caused your district to consider reorganization?

Five factors were identified as having caused districts to consider reorganization. These factors were: declining student enrollment, state incentives to reorganize, financial pressures, increased curricular and/or cocurricular opportunities for students and the desire to find a like-sized partner with which to merge in order to avoid assimilation into a larger district.

Declining Enrollment: Twelve respondents indicated declining enrollment was a factor leading to the reorganization process. Superintendent Williams said “The Fairburn-Griffin School District had reorganized not too many years prior to the Fairview Community School District reorganization” (J. Williams, personal communication, April

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11, 2008). He indicated the Hiram school district was losing enrollment. The Board of Education from the Fairburn-Griffin School District became aware the Hiram school district was interested in considering other districts as potential reorganization partners. Williams further stated the Fairburn-Griffin district was both “progressive and aggressive” in their pursuit of Hiram “as they immediately recognized that the Fairburn-Griffin District ... needed additional territory of students to stay viable for the next fifty years or so.” Fairburn-Griffin board member Moore agreed. “It seemed at that time... that all the smaller schools had to start reorganizing or the state would do it for them. Nobody wanted the state to make a choice for each school district” (D. Moore, personal communication, April 12, 2008).

The Hiram board member agreed with the Fairburn-Griffin representatives. Board member Miller said, “The primary factor was ... declining enrollment” (M. Miller, personal communication, April 11, 2008). Miller indicated Hiram had qualified teachers and was financially stable enough to continue functioning as a viable entity. However, he went on to say, “We didn’t have the students. We didn’t think it was fair to have only one or two students per class. We just didn’t think it was fair to them.”

Superintendent Jackson commented on the effects of declining enrollment. “The Toccoa board was thinking about where they wanted to be and what they want to do. They really focused upon the continuous declining enrollment in their district” (M. Jackson, personal communication, April 25, 2008). Oconee board member Thomas concurred. “We were losing too many students as rural communities were depleted of people” due to the younger generation moving to larger population centers (P. Thomas, personal communication, April 25, 2008).

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State incentives to reorganize: Four respondents mentioned state incentives making a difference in the decision whether or not to consolidate. The State of Iowa offered incentives to encourage districts to share programming. According to Jones, superintendent of both the Marietta and Norcross districts prior to and after their reorganization as Liberty Community School District, “the state at that time, in the middle 80’s into the 90’s, provided adequate (sharing) incentives so that both districts could benefit. In fact really there wasn’t an incentive to move out of the sharing agreement” (P. Jones, personal communication, April 11, 2008). However, the situation would be altered. “The sharing monies changed from the state, and they were eliminating those monies just for sharing purposes,” Jones noted. She went on to indicate the boards from Norcross and Marietta chose to “move ahead and go ahead with the... consolidation,” as the state presented a five year window during which districts would receive financial assistance for reorganization. Liberty board member Davis agreed. “The sharing incentives were going away and there were new incentives from the state for districts that were looking at reorganization” (L. Davis, personal communication, April 11, 2008). After a study of what reorganization would mean for each district, the school boards “decided because the sharing had been going so well for so many years already that we should look at combining the two districts” declared Davis.

School districts had become dependent on the funding provided by the sharing incentives. Superintendent Adams told the story of the process that gave rise to the Shady Grove Community School District. “In 1989 the (Athens) district had to make a choice on whether it would continue with the sharing agreement or not with Brunswick” (T. Adams, personal communication, May 30, 2008). Adams went on to say, “The reason

that 1989 was a big year is because we were receiving supplemental weighting for the students and for the administrators that we were sharing between the districts. We were informed then unless we seriously start talking about reorganization then all of that would go away. We had gotten used to the funding.”

Financial Pressures: Seven of those interviewed mentioned financial pressures as a motivating factor in the decision to reorganize. Jasper board member Taylor discussed reorganization from the perspective of finances. “Our unspent balance was decreasing and it just looked like we not going to be able to continue the way we were and give the kind of quality education that we thought we needed to” (C. Taylor, personal communication, April 24, 2008). Lithonia superintendent Robinson concurred with Taylor, pointing out, “It was becoming difficult to provide the programs that we wanted to provide both financially” and in terms of numbers of students (T. Robinson, personal communication, May 1, 2008). Lithonia and Jasper would eventually form the Oak Grove Community School District. Marietta board member Green may have stated it most succinctly when he said, “Expenses were going up” (J. Green, personal communication, April 11, 2008).

Increased opportunities for students: Eight participants cited increasing opportunities for students as a reason to merge. “I think Duluth and Conyers were both looking to possibly consolidate to provide a better school for both communities” (K. Clark, personal communication, May 2, 2008) commented board member Clark when asked what prompted his district to consider merging with another. Board member Wright from Duluth agreed. “You could say we were a little dissatisfied with the educational opportunities that we were providing for the students in the Duluth School

District. So we began an extensive look at what we could do to share assets with neighboring school districts” (R. Wright, personal communication, May 16, 2008).

Superintendent Jackson (Sparta-Oconee) and board member Lee (Toccoa-Zebulon) also invoked the desire to provide increased opportunities for students when explaining the process resulting in the New Hope district. Jackson indicated increasing opportunities would help alleviate safety issues. He observed the Sparta-Oconee district was approaching “the point where they could not fill all of the activities that they wanted to have available to kids. And when you get to the point where you have freshmen competing at varsity level against older kids and bigger kids that starts being a concern to parents and to board members.” Lee made no pretense of reorganizing purely for academic reasons. “I think we had 22 boys out for football and we couldn’t even finish the last game because of injuries. I know you aren’t supposed to use sports. But that is what led us...” to reorganize, (G. Lee, personal communication, April 25, 2008).

Search for a similar partner: Two people interviewed mentioned the desire to find a partner for reorganization of a similar size. Superintendent Walker of Conyers observed, “The Conyers district felt it would be advantageous to us to increase the size of our district and our enrollment” (T. Walker, personal communication, May 15, 2008). Therefore, the Conyers board was agreeable to the advances of the Duluth board. Duluth board member Wright attested, “We wanted to try to stay with the school district that was maybe closer in size where we had maybe a say in things.”

Question Two: Did your district use the services of an out of district consultant in the reorganization? If so, describe the role of the consultant in the reorganization of your district.

Five respondents indicated the use of an outside consultant, while fourteen participants stated the services of an outside consultant were not utilized. When used, these consultants were usually associated in some fashion with the Iowa Department of Education, the area education agency, or one of the universities in the state. It was reported that these consultants would study either of the districts considering reorganization and/or neighboring districts and make projections and recommendations based on their findings. Superintendent Adams commented, "We did bring in (a consultant) for basically one meeting with the joint boards. He just talked about reorganization." Superintendent Johnson from Jasper used multiple consultants. She mentioned one consultant who "would come in and he would do a study of all the schools around and then tell you all your possibilities" (M. Johnson, personal communication, April 11, 2008). Johnson used the services of the Iowa Department of Education (DE). "At that time the DE had a lot of leadership. And most of the people that worked for the DE were former superintendents and they really understood schools, they understood budgets," observed Johnson. Superintendent Johnson also mentioned using professors from Iowa State University and the University of Northern Iowa as consultants.

Jasper board member Taylor had similar recollections to Johnson. He brought up one consultant who "came out and said that the combination of the two schools would work, but not for an extended time frame". Taylor continued, "And they projected a ten-year time frame when we would probably have to do something again. That was in 1993 that we actually went with Lithonia. And they were pretty close" as the Oak Grove Community School District is once again sharing with another district, fifteen years after their first consolidation.

Toccoa-Zebulon board member Board member Lee remembered using consultants from the DE, specifically “this man (who) came and had a couple of meetings with us and really opened some people’s eyes up.” Lee recommended the use of a consultant. “I think it would be wise if you brought an outside person who was unbiased,” Lee observed.

Question three: What strategies utilized to enhance the reorganization process for stakeholders proved to be most productive and nonproductive?

Many factors were discussed in regard to strategies which productively enhanced the reorganization process. These included dissemination of information through various media and public presentations, cooperative work in committees and between the respective boards of the districts, and seeking input from stakeholders in the process. Also discussed in detail was a history of sharing between the districts, strong leadership during the reorganization process, the celebration of successes, and having one superintendent nearing retirement.

Seeking stakeholder input: Board member Davis was one of nine respondents who stressed the importance of seeking stakeholder input. Teachers were an important stakeholder group. When reorganization occurred, the districts involved were required to agree to a new master contract. “Any time you are talking contracts for teachers, that is a big issue for them,” Davis observed. “We had to talk about ... what that (the new contract) may look like. So that was a big part of it of making sure that those stakeholders were taken care of as well,” she said.

Superintendent Jackson had similar recollections of the process leading to the merger of his districts, Sparta-Oconee and Toccoa-Zebulon, into the New Hope

Community School District. "We tried to involve as many stakeholders as possible," he said. Jackson indicated representatives from stakeholder groups including students, community members, and teachers were given the opportunity to make their opinions known through public meetings.

Jasper board member Taylor stated, "We held community meetings in both districts where the patrons were encouraged to come and ask questions of the boards and to just get a feel of where we were at and what was going on." Board member Thompson of Athens declared, "We listened to feedback from lots of different people. We listened to all the way from extracurricular to our academic people all the way to preschool programs. And then we also brought in parents from both districts" (S. Thompson, personal communication, April 26, 2008). Board member Wright of Duluth may have summarized the importance of stakeholder input when he related the following experiences. "In some regards you have to be able to bring your community with you," Wright observed. "Part of that is selling to the community and letting them have their input." He continued, "We had lots of communication with the community... we had lots of meetings."

History of sharing: Seven participants praised the effectiveness of sharing efforts prior to the consolidation effort. Superintendent Walker, who led the reorganization of the Conyers and Duluth districts into the Maple Grove district declared, "The whole grade sharing was very beneficial. It gave both districts three years to evaluate the situation." However, Walker warned, "As far as the superintendency was concerned, it meant that I had to serve two different boards and wear two hats." He concluded, "Personally I guess it wasn't something that I would have wished to do if it wasn't for the

fact that (it) would lead to a goal that we all had.” Marietta board member Green agreed. “I think probably the most productive was to get the same superintendent in both schools,” Green recalled, “The sharing of our superintendent meant that both boards were getting the same information and so it just basically got presented the same way in both schools.”

Other superintendents cited the benefits of sharing as well. “Everyone was very happy with the sharing agreement,” said Superintendent Adams of Shady Grove, “There was really no need to do anything different because it was working so well.” Superintendent Jones of Liberty School District concurred, stating “I think the use of sharing really made the situation much better for Marietta and Norcross when they reorganized than in some other situations that I have seen.”

Cooperation: Six respondents stressed the importance of cooperation between superintendents and board members from all districts involved in reorganization. According to Superintendent Williams of the Fairburn-Griffin district, cooperation was essential to success. “There weren’t many super strategies other than a lot of good old-fashion common sense and communicating frequently,” declared Williams. “And not getting choked up on minutia,” he continued. “Everybody entered into that thing with a spirit of cooperation,” Williams remarked. Assessing the process of becoming the Fairview School District, board member Miller of Hiram agreed, “When we interviewed with Fairburn-Griffin board, they were very professional and very cordial. It was just a really good fit for us.”

Shady Grove Community School District had similar experiences to those of the Fairview District. Athens board member Thompson pointed out, “We put together a

group of school board members and administrators from both districts and we met on a monthly basis, more often if needed.” Thompson said, “we covered different topics that we felt were going to be a concern for us if we moved into consolidation.” Board member Martin of the Brunswick District agreed with Thompson regarding the road to forming Shady Grove. “I was on a committee” (B. Martin, personal communication, April 26, 2008) he noted. “We met virtually weekly, an hour each meeting. If I remember right we probably had thirty some issues to deal with,” Martin continued. In describing the work of the committee, Martin cited a process in which committee members would rank issues from most important to least important. He remarked committee members were somewhat surprised that upon meeting, the committee “determined we weren’t as far apart as we thought.” At each meeting the committee would start at the top of the list of issues, discussing each issue as they worked down the list. After an hour the meeting would adjourn. However, “at the next meeting we would probably come back and go back and revisit two or three of the issues from the time before and change our minds,” Martin chuckled. The importance of these committee meetings was evidenced at the public meetings held later. When the public would ask questions, the committee “had an answer,” Martin said.

Strong leadership: One of five respondents to share this opinion, board member Moore of the Fairburn-Griffin board extolled the virtues of having a potent torchbearer to show the way. “Our superintendent...just took care of everything. He set up time lines for everything (ensured) that everything went smooth,” said Moore. Board member Green from Liberty expressed the opinion that his district was “blessed with good superintendents.”

Dissemination of information: Four participants in the study indicated the need for keeping stakeholders informed of the proceedings of the reorganization effort. Superintendent Jones of the Liberty School district stated she “used our local newspapers. We’ve got two great newspapers that were always willing to give us space for press releases.” This circulation of accurate information was necessary because, as Jones indicated “Some people on the street might have considered us to be already reorganized.” Liberty board member Davis agreed. “We held meetings with anyone from the towns who wanted to come and ask questions,” she remarked. “We went to some of the different clubs in town ... to get the word out about why we were doing this,” Davis continued, “what the benefits would be, that type of thing. There were also newsletters that went out.”

The Hiram board also worked to get the word out. Board member Miller remembered, “We did go out to all the community organizations. The superintendent and myself would go to those meetings and explain why we were doing it and why we thought it was the best interest of the students to do that.” Miller continued, “We also had public meetings in the school. We invited the patrons to come and hear the rationale behind (reorganizing).”

One superintendent willing to leave: Two study participants said the imminent departure of one superintendent expedited the process. Superintendent Williams acknowledged that during the Fairview reorganization, “It helped that the Hiram Superintendent was nearing retirement age so they (the school board) didn’t have any problem with who was going to be the superintendent.” Superintendent Johnson of Jasper agreed, indicating she was willing to resign her position if such an action would expedite

the merger process. Her claim was validated by Jasper board member Taylor, who remarked, "(Superintendent Johnson) said that if we combined she would resign."

While none of the respondents mentioned strategies that were non-productive, many mentioned issues that proved to be stumbling blocks along the path to reorganization. Communities were concerned about losing their school and this concern manifested itself in a lack of trust between stakeholders and the rekindling of long-standing rivalries and hard feelings from long ago. Conflicts arose over the combining of the master contracts for certified personnel of the respective districts. Issues concerning the transportation of younger students were common. Also tied to the identity crisis felt in the communities was the choosing of a new name, mascot and colors for the new school district, as well as concerns about the fairness of participation by students in extra-curricular activities.

Lack of Trust and long-standing rivalries: "It was just a trust thing," board member Moore declared. Moore was one of five respondents citing a lack of trust as an impediment to the consolidation procedure. "I remember at an open meeting one time, we had community meetings, and this one guy stands up with his hammer and said something to the effect that 'you know, we don't know if we can really support this because we don't trust you board members from Fairburn,'" recounted Moore. Superintendent Jones, while not experiencing a lack of trust, did state "I think if there was mistrust that might be difficult."

During the reorganization process that birthed the Oak Grove Community School District, there was a great deal of mistrust between Jasper and Lithonia. Superintendent Johnson related a story once told to her depicting a long history of suspicion and

misgiving between the communities. "Jasper was a solid, little German community while Lithonia was almost solid Norwegian," she stated. "This one lady came to teach in Lithonia during World War II, and they were given a directive as teachers not to have anything to do with the Jasper people because they were German," Johnson continued, "Of course there was a lot of stigma about being German at that time. She ended up marrying a man from Jasper and I guess was just about ostracized in Lithonia. So they have a long history of absolutely not getting along together," she observed. This mistrust between the communities carried over to the reorganization process. "There was a lot of competition between Jasper and Lithonia and no one ever wanted to give in," Johnson commented.

Marietta board member Green related a similar observation, though not to the extreme of Jasper and Lithonia. Green indicated the biggest "stumbling block was probably some of the rivalries between the towns." "Marietta and Norcross were big rivals years ago in basketball," Green stated. He went on to say one of the first board meetings he attended as a member included a discussion of the sharing agreement between the two towns. Green inquired as to the cause of the animosity between the two towns. "One of the older board members who was probably 75 said that he felt that it was feelings between some basketball players that (dated back to) when he was high school," Green recalled, going on to declare, "And so the adults in the towns were the ones that were really the rivals."

Athletics / Activities issues: Four respondents regarded naming the school and choosing new school colors and a new mascot as the most divisive issues facing districts seeking to merge. Toccoa-Zebulon board member Lee recalled, "When we reorganized,

one of the (consultants) that we went to see said that when the two districts reorganized you get a new mascot, because you now have a new school district and the old districts don't exist any longer." However, that scenario did not play out for Toccoa-Zebulon. "It was just like we were pulled in to Oconee," Lee remarked, "We had to take their mascot and that soured a bunch of people." Lee remembered he "argued and argued that point (the need to change colors and the mascot)" at a board meeting "and it was just fell on deaf ears." Lee's adversaries argued such a change would be too expensive. Lee then advocated not changing the entire uniform, but possibly changing only the helmet decals for the football team. Again, Lee's efforts were thwarted. The mascot issue re-emerged during an open meeting in Toccoa regarding the construction of a new school building in Oconee. "Boy, there was one lady who got up and just reamed them a new one," Lee recalled with a chortle, "She said, 'we didn't ask you to take our mascot.'" A subsequent bond issue for the new district failed.

The Maple Grove Community School District was not immune to the district name issue either. According to Duluth board member Wright, people from Habersham, a town absorbed by Conyers in a previous merger, were angry that their name would be left out of the new district name. Clark of the Conyers board agreed. "The most difficult was the district name. Everyone wanted Conyers or Duluth. Habersham felt like maybe they got left out," he stated. Regarding these issues, Clark mentioned, "My personal experience was that the (district) name or sports or just generally extra-curricular activities were more difficult to resolve than the educational concerns."

Brunswick board member Martin noted the color / mascot issue arose after the consolidation was finalized. "The only thing I know of that didn't work was that we

forgot one item and that was school athletic uniforms," he recalled. "Getting those changed to (the) new districts names, that became a minor (issue)," Martin commented. When the fall athletic season started, it was noticed "we've got colors of the Shady Grove School, but they were wearing Athens uniforms," Martin said, "So that had to be addressed after the merger took place." Athens board member Thompson observed there was some concern regarding positions and playing time for students in extra-curricular activities after the merger. He indicated people feared "bringing kids in from Brunswick." These same people questioned "will they take our particular positions in Athens" whether it be in athletic endeavors or first chair in the band, according to Thompson.

Transportation issues: Four study participants mentioned transportation issues as a stumbling block. Board member Moore understood why his constituents would be concerned about transportation. "People were just really against having their kids on the school bus going that far all the time," he said. Superintendent Jackson faced similar constituent viewpoints regarding transportation, especially in regard to wait time at sites where students would leave one bus and board another. He indicated "The amount of time the elementary students in both districts would initially sit on the bus waiting for... shuttles was problematic." Jackson went on to say, "There really wasn't probably a good way to do that especially because we wanted the elementary kids at the high school waiting for that shuttle when it came in so there wasn't any downtime when that came in." Jackson told of the unique steps taken to solve this problem. "The bus drivers were tasked with finding their best solution for doing a bus driver exchange versus a kids exchange," he said. The drivers identified a location between the two towns. "The county went out and literally developed an area on both sides of the road where the busses could

pull off completely, and there would be visibility between bus driver and bus driver,” Jackson continued. One driver would exit their bus and walk across the road. At the moment the first driver was able to observe the interior of both busses, the second driver disembarked “so there was always visibility of what was going on” in both busses. As a result, “the Jasper bus would end up going to Sparta and the Sparta bus would end up going to Jasper with different drivers who just came from where they are going to back to,” Jackson said.

Concern over losing school: Three respondents discussed losing the school and identity as issues that may hamper reorganization efforts. “The only concern that some of the folks in Brunswick would have, and rightfully so, is they were concerned about how long they would have classes in Brunswick,” observed Athens and Brunswick Superintendent Adams, “because once you lose a school then the community has a tough time with keeping their identity.”

This perceived loss of identity resulted in continuing discord in one district. Toccoa-Zebulon board member Lee pointed out, “You’ve got to maintain some identity.” He stated, “Even though we had the middle school over at Toccoa,” the town lost a degree of recognition. “They (Toccoa) wanted to keep the Bulldog (in the middle school) for the mascot,” Lee claimed. “But it had to be changed to a Tiger,” he said. “I guess that is what you do,” Lee glumly recognized, going on to say, “I graduated from Sparta. I was in (the) reorganization back in ‘56 and ‘57 when Oconee went up to Sparta. It was the same deal then.” “We just basically lost out and were absorbed,” Lee charged. He concluded, “If I had to do it all over again... I think it would have been almost easier to sit back... and wait for the State to divide it up.”

Question four: Were there unintended consequences of your district's reorganization?

Respondents were generally positive regarding the unexpected outcomes that occurred as a result of reorganization. Changes to the activity programming of the districts occurred. Special education programs grew stronger and better served their students. From a financial perspective, one district was able to reduce administration while other districts were successful in passing bond issues. One respondent saw an increase in open enrollment in to the newly formed district while another indicated enrollment stabilization. A board member mentioned the merger of two districts formed a broader community, and another indicated new housing developments grew as a result of the stronger district.

On the negative side, changes were forced on the reorganized districts when financial incentives from the state ended. One of the consolidated districts is considering a second reorganization. Also, seven respondents reported an increase in open enrollment out of the newly consolidated district. Four respondents indicated there were no unintended consequences resulting from their district's reorganization.

Changes in activity programs: Six participants in the study discussed the unforeseen changes to the activity programs in the district. Superintendent Williams said of the new Fairview District, "Obviously we became a larger school after we merged and moved up in the class for athletics." This increase in size caused some board members and constituents to feel the high school should join a conference of larger districts. "Subsequently we joined one of the strongest conferences in the area, the River-Valley

Conference,” he stated, “As a result we just got ripped consistently for a number of years before we grew up into that level of competition.”

Shady Grove School District had a dissimilar experience as extra-curricular activities saw success after the reorganization. According to Superintendent Adams, after the consolidation the students “were Shady Grove kids.” However, the adults in the district had “real concerns that athletes coming over to Athens (from Brunswick) would be gobbled up and wouldn’t get playing time,” acknowledged Adams. “Well, as it turned out Brunswick had some great athletes at the time. We built a volleyball team around a Brunswick player. The boys’ golf team won the state boys golf title, and all but one (golfer) was a Brunswick kid,” stressed Adams. “So, you know,” Adams remarked, “those kinds of things worked well too. There was more apprehension before (reorganization), and then once it happened everything seemed to be fine.” Adams finished his assessment of the merger by saying, “I guess the thing that I found remarkable was that... it wasn’t a situation where Athens was gobbling up Brunswick. Athens needed Brunswick as much as Brunswick needed Athens.” Board member Thompson indicated the hope of the Athens board was that merging with Brunswick would result in an immediate increase in the number of students participating. “Our numbers were obviously going down in football,” commented Thompson. “We thought, well they never had football before and we will pick up five, six, or seven kids a class because they were pretty good athletically. We thought we might pick up four, five, or six wrestlers. We thought we would pick up maybe five or six volleyball girls,” Thompson said. However, he stated, “It did not really develop right away. It took us about 4 or 5 years,” to see the number of participants increase.

Superintendent Johnson and board member Board member Taylor of Jasper agreed on the impact reorganization had on activities in the newly formed Oak Grove Community School District. Johnson recalled "Jasper was really into girls' sports while Lithonia was more into boys' (athletics)." The girls' basketball coach at Jasper had taken the team to the state tournament many times, "but never got very far," according to Johnson, who stated, "I don't think he ever made it past the first round." After the reorganization, the coach and the Oak Grove team won the state tournament. During the time of the Oak Grove reorganization, the Iowa Girls High School Athletic Union still sponsored a six on six player tournament. "The starting line-up consisted of three Jasper girls and three Lithonia girls," Johnson said, beaming with pride. Board member Taylor agreed with Johnson's assessment, remarking "the very first year that we combined we won the girl's state basketball tournament, and you know, that really helped mend a lot of fences." He cited this success as creating "a lot of positive reinforcement" which allowed district patrons "to be comfortable quicker than they may have ... if we hadn't had success."

Improved financial condition: Superintendent Jones and board member Davis were among six participants in the study who agreed the reorganization process improved the financial situation of the new district. Jones commented, "We were able to pass a bond issue after two failed attempts at the Marietta Community School district before consolidation." She added, "Once we hooked up and made an indication that we were here to stay passing the bond issue, though not easy, was accomplished just two years after the consolidation." Davis concurred, observing "we were able to pass the bond issue which was a big thing. Marietta had tried twice with a bond issue to build a new

auditorium/gymnasium, some classroom space, but wasn't able to" before the reorganization.

New Hope board member Board member Thomas and Shady Grove Superintendent Adams witnessed similar votes in their districts. "Right now as we speak we are building a grade school," declared Thomas. Superintendent Adams observed, "We also had a bond issue that we were looking at in Athens which would raze a three story building and then do some remodeling and also do an addition on the back." The bond issue passed with ninety-nine percent of the voters casting affirmative ballots.

Superintendent Jackson of New Hope pointed out an area of cost savings for the district. "We did a downsizing of an administrator that was not an intended outcome, but it worked," he said. "We had an administrator retire and we chose not to replace him, so that was a savings for both districts in that respect," Jackson noted.

As for strengthening enrollment, board member Wright of Maple Grove mentioned the reorganization "helped stabilize the district's student numbers." Also, as discussed earlier, Liberty's board member Davis noted "that kids are open-enrolling into that (special education) program."

Broader community / new development: Marietta board member Green spoke of the positive change to his town and Norcross as a result of the reorganization of their school districts. "You know I think because we are two smaller communities about the same size it really helped because we needed each other," he stated. "If there was a bigger school district and a small school district then a small one would tend to lose out," Green remarked, "but we still have our own grocery stores."

"Because I am from Marietta when our kids were in middle school at Norcross we would go and buy things in the grocery store while we were waiting for our kids; stop in after sports and that type of thing. So I think it is more unintended good things that happened because of that," Green stated with a smile, "And now it is hard to even know who is from what town. It is just like one big community."

Board member Wright of the Duluth district believed the reorganization with Conyers would spur housing starts in his community. However the speed with which this development began and the types of homes being built surprised him somewhat. "If you go out and look down at Duluth there are a lot of housing developments on the east side of (town)," Wright observed, including a development of executive homes on a new golf course. Furthermore, "On the north side of Duluth going towards Bonita Springs there are all kinds of new houses built out there in the countryside," observed Wright.

Improved special education program: Two respondents cited changes to their district's special education program as a benefit of consolidation. Board member Davis, a member of the Norcross board, credited reorganization with improving the programming for special education students, stating the program "really has taken off." Davis continued, "We actually have an accredited special education program right now that kids are open-enrolling into that program; so that was really beneficial." Liberty School District Superintendent Jones agreed, pointing out "the special education complex which is directly integrated into the school."

Open enrollment out of the district: Seven participants in the study were surprised by the number of students leaving the newly formed district. Brunswick / Shady Grove board member Martin acknowledged, "We lost a few students just because there are some

on the fringes that open enrolled out but not many.” Shady Grove was fortunate in this regard, as other districts experienced an exodus of students. Oak Grove School District, formerly the Jasper and Lithonia districts, endured such a flight of students. “We knew that we would have some open enrollment,” lamented Jasper board member Taylor, “but obviously when you try to combine you hope that you do not have a large amount of open enrollment ...we had a considerable amount because of geography.” Taylor mentioned three neighboring districts which benefited from drawing Oak Grove students. The Lithonia leadership agreed. Superintendent Robinson asserted, “There must be 100 students from the Lithonia area going over to Statesboro.” Lewis remarked, “We have 19 more open enrolling this year” (M. Lewis, personal communication, May 5, 2008). Lewis added, “It really hurts me too because my (taxes are paying for) building new schools and stuff and none of my grandkids are going there. They are all going to Statesboro.”

New Hope School District is suffering a similar reality. Superintendent Jackson noted, “(the district is) also doing a lot with open enrollment (out of the district). Because of where New Hope is located it is easy to see how that could happen.” According to Jackson, there are three larger districts bordering New Hope that attract students from the smaller district. Board members Thomas and Lee support Jackson’s conclusion. Thomas declared, “Probably the worst thing that hit rural Iowa is called open enrollment. We lost a lot of students and consequently a lot of money.” Lee agreed, saying discord throughout the New Hope district “caused a bunch of open enrollment money to leave the district.”

Second reorganization: Superintendent Robinson said of the Oak Grove School district that the most surprising aspect was “for all practical purposes it is done, it did not last very long.” Superintendent Johnson, the other superintendent involved in the Oak

Grove reorganization agreed. "I hear that Oak Grove is looking at (another consolidation) now," she said, seeming somewhat disappointed that her work of roughly fifteen years ago is being replicated due to factors similar to those that spawned the original reorganization.

Additional Comments: Additional comments from the respondents were varied. While nine of those who were interviewed had no additional comments, the majority of respondents did wish to add to what they had already shared. Responses included a general feeling that the reorganization occurred without many difficulties and that students were being included in activities in a fair manner. Several people reiterated the importance of strong leadership from the board and superintendent. Unfortunately, in two cases there were continued reports of animosity between the communities involved in the reorganization years after voters approved the merger.

The reorganization process worked well: Eight study participants expressed great satisfaction with the reorganization process. Superintendent Williams of Fairview commented, "It just went so smoothly. I think when we had the election, if I remember right, I think we had eleven no votes." Superintendent Wilson and Board member Miller concur. Wilson stated, "Overall I just thought everything went off real good" (B. Wilson, personal communication, April 12, 2008). Miller observed, "It really worked out so well, it couldn't have been any better. There were good administrators that worked together and I think to this day it is a great district."

Shady Grove superintendent Adams pointed out why the reorganization he supervised worked so well. "I think if you are looking at a reorganization that works, you can't have the larger partner calling the shots and come across as gobbling up the smaller

school,” Adams declared. “And when I had board members from Athens that looked out for Brunswick being better than the Brunswick board did,” he continued, “that was the kind of an attitude that I think made this work so well.”

Perhaps the best illustration of a smooth merger occurred during the formation of the Liberty district. Board member Green illustrated his point by stating, “a lot of people in our community thought we were reorganized ... for maybe five years” before the reorganization vote occurred. Green attributed this confusion to the long standing sharing agreement that existed between Marietta and Norcross.

Strong leadership is important: Five respondents stressed the importance of leadership. Board member Green felt the Liberty district was “blessed with good superintendents.” Fairview board member Moore commented “(the superintendent) was the right person to have here because he just took care of it. And the board president was a real good PR man. He could just handle people real well.”

Animosity still felt between communities: Two districts still experience difficulties accepting their reorganized status, according to respondents. Duluth board member Wright, when discussing the Maple Grove District merger, related this story. “We had one guy get up and say, I forget, but I think he was in the Conyers district, and he said ‘I got cousins in the Duluth district and I don’t want them’” attending school with my children. Regarding this sort of discord Wright said facetiously, “It makes Thanksgiving and Christmas real comfortable (to have family members on opposite sides of reorganization issues).”

Sadly, the enmity between the communities that now form the New Hope Community School District goes much deeper. “This school reorganization was one of

the only things in my lifetime that I just don't (know) why we did not get it done right," grieved board member Thomas. "I think we did everything according to the book," he said, "But it is still out there yet all these years later." Thomas continued with regret in his voice, "And still people have hard feelings and I don't understand why the people can't join together; but that is the way it is and I am never going to live long enough to change it." Thomas told of "people in Toccoa and people in Oconee (that) don't speak today yet." "Families torn apart," he continued, "people just took this thing so seriously." Thomas states there are still people "that I'd just as soon not run into on the street." "There are families that don't talk. People in both towns that won't go into the other town, or would rather not" he remarked. Thomas concluded by noting nearly two decades after the reorganization, some residents, "if they are going to pick a restaurant to go eat at tonight they will pick the other town, the opposite town if they are both from Toccoa. If they have to come to a wedding or something they know they can do that. But, it is has still carried out that long."

Chapter 5

CONCLUSIONS

Introduction

The purpose of this study was to better understand the process by which two or more school districts reorganize or consolidate in the State of Iowa, giving special attention to considering why some school districts have accomplished voluntary reorganization while others have not. Participants identified reasons for pursuing reorganization, whether or not to utilize the services of a consultant, the productive and non-productive strategies employed in the process and unintended consequences of the reorganization.

Qualitative methodology was employed to collect data using semistructured interviews to gather information from nine superintendents and twelve school board members involved in six successful reorganizations. Through open ended interviews and document reviews the researcher determined actions school districts should take to ensure successful reorganization.

Summary

The findings indicated the participants identified five factors that compelled districts to pursue consolidation. These factors were: declining student enrollment, state incentives to reorganize, financial pressures, creation of increased curricular and/or co-curricular opportunities for students, and the desire to find a like-sized partner with which to merge. The findings further indicated six districts worked with one or more consultants during the reorganization process.

The findings identified six productive strategies that facilitated the merger procedure. Strategies utilized during the process included disseminating information throughout the community, promoting cooperation among the superintendents, board members and stakeholders of the school districts involved and seeking stakeholder input during the process. The participants indicated related strategies which occurred either before or after the reorganization and/or attributes possessed by merging districts that enhanced the procedure. These attributes were a history of sharing between the districts before the merger, strong leadership and the knowledge that one superintendent would leave the district after the completion of the reorganization.

The participants identified four nonproductive strategies, or roadblocks, which served as an impediment to reorganization. These included concern on the part of at least one community over the prospect of losing their school and therefore their identity, a lack of trust and long-standing rivalries between communities, conflicts that arose around transportation issues, and differences of opinion when selecting a new name for the district and a new mascot and school colors.

The findings verified changes in activity programs, improved programming for special education students, strengthening of the reorganized district's financial position, the growth of a larger community encompassing both towns in the reorganized district and new housing developments as positive unexpected or unintended consequences of the reorganization. Negative consequences included the need for a second reorganization a short time after the original merger and the flight of large numbers of school children to neighboring districts *via* the open enrollment option available to Iowa students.

Twelve of twenty-one participants indicated they had additional comments to share at the end of the interview. Most of these remarks were positive. Among them were observations relating to the overall process including the need for strong leadership from the superintendents and board members involved in the reorganization. Negative findings centered on the rancor which continued to exist in some of the communities involved in consolidating their districts. One participant indicated the importance of following the Barker Guidelines (Appendix B) when closing a building.

Discussion

The researcher was struck by the similarities in the perception of the success (or lack thereof) of the reorganization of any district by the participants in that merger. The Fairview consolidation was seen as a positive step by both superintendents and both board members taking part. Superintendent Williams felt "It just went so smoothly." Superintendent Wilson said "It went off real good, I thought." Board member Miller declared that over a period of time, district patrons felt "that everything was good." The participants in the Oak Grove reorganization echoed the sentiments of the Fairview leaders. Superintendent Adams, superintendent of both the Athens and Brunswick districts, saw the consolidation as "a good arrangement for both (districts)." Board member Thompson called the merger "a win-win" for each district, both academically and athletically. "Talking to other districts that merged after ours or had merged before," remarked board member Martin, "I think that we had one of the smoothest mergers that occurred."

The reorganized Maple Grove district and the consolidated Liberty district also reported positive results. At Maple Grove, Superintendent Walker called the

reorganization “a pretty smooth transition.” Board member Clark stated, “It worked for both districts.” Liberty board members Davis and Green agreed with their Maple Grove counterparts. Davis felt the consolidation “has been very positive for our district.” Green indicated that many district patrons were of the impression the reorganization had already occurred before the election took place due to the fact that “everything went so smooth.”

Everything did not go smoothly for Oak Grove and New Hope, as reflected by the statements of the participants. Superintendent Johnson recalls an open meeting that was held in a gymnasium in order to accommodate all who wished to attend. The discussion became heated as Jasper and Lithonia tried to gain strategic advantage. Johnson attempted to encourage one of her board members to cast the swing vote that would lead to consolidation. Her recollection was that the Lithonia board was hoping Jasper would not sign the agreement to share programming. Johnson felt the Lithonia board believed they would derive an advantage in the negotiations should Jasper fail to sign. Finally, according to Johnson, Jasper board member Taylor “standing up, taking his pencil, and throwing it across the room, and he said ‘I’ll sign your damned (form). Here is your damned thing.’” Johnson said he continued, “I will sign your damned thing, but you have to be serious about consolidation within the next 2 or 3 years.” Johnson believed this act led to the reorganization of Jasper and Lithonia and gave Jasper an advantage during the process. Board member Taylor remembers the event and stated, “I never regretted that after I did that.” His one regret related to something over which he had no control. Taylor indicated that while “the students did not have any problem with the reorganization... parents and grandparents” struggled with the merger. “The older they (parents and grandparents) got, the worse it got,” he continued, “Just because we were Lithonia and

Jasper” and had been rivals for years. The Lithonia superintendent had the strongest viewpoint regarding the Oak Grove Community School District. “My opinion is that dissolution would be perfect for that district,” Superintendent Robinson flatly declared.

New Hope board member Lee believed the original process was pursued too aggressively. “When you get people with an aggressive attitude (they say), ‘well you are not going to tell me what to do,’” he said, “If we are going to close your building we will just close it.” “A little finesse here and there could have brought some votes in and saved some money,” Lee commented. Of all the participants in the study, board member Thomas of Sparta-Oconee possessed the most intense ruefulness regarding the reorganization of his school district. “Sometimes as I look back at what I should have done,” he lamented, “I should have gone over and sat down with more of those people.” “But the stubbornness of them, or maybe me, prevented this from happening,” Thomas mourned.

The participants indicated agreement as to the reasons to consider reorganization. Declining enrollment, financial pressures, and state incentives were all prominent factors in the decision to merge. When these aforementioned economic factors were combined, the desire to increase opportunities came in a distant second. The majority of respondents indicated they did not use an out of district consultant by a tally of fourteen to five. Those who did use a consultant expressed satisfaction with their decision to do so.

Conclusions

School districts in Iowa face continuing and increased pressures from declining enrollments and declining revenues while struggling to meet the increasing demands placed upon them by government, stakeholders and institutions of higher learning. While

declining enrollment and financial difficulties produce a certain amount of urgency, districts considering reorganization also considered the opportunities consolidation would provide for their students.

The success of a merger was enhanced by a history of sharing and cooperation between the districts, strong leadership, the free sharing of information regarding the process and by leaders seeking input from their constituents. On the negative side, a lack of trust between the districts and dissension among stakeholders due to issues surrounding activities contributed to dissatisfaction among participants regarding the consolidation process.

Recommendations

Based on this study, the researcher makes the following recommendations to Iowa school boards, administrators, and communities considering school district reorganization:

- Consider enrollment trends and the financial state of all districts potentially engaging in the reorganization.
- Weigh advantages gained from the increased curricular and co-curricular opportunities available to students that will result from reorganization.
- Explore and utilize financial incentives from the State of Iowa to help finance the reorganization process.
- Share programming between the districts as long as is feasible before finalizing the reorganization.

Once the decision to reorganize has been made, the process will be ameliorated by the following actions on the part of district leadership:

- Seek and act upon stakeholder input in order to make the transition from multiple districts to one district more agreeable. This may be done by creating committees (by invitation) of teachers, students, staff members and community members.
- Establish lines of communication early in the process in order to circulate information to interested parties through newsletters, newspapers, public forums and presentations by district leaders at civic organizations and other meetings and through electronic means such as web pages and blogs.
- Superintendents and school boards must lead the reorganization with the goal of doing what is best for the students of the new district. Positive leadership is necessary for successful, lasting consolidation.
- Concerns over loss of identity, potential barriers surrounding activities programs, transportation issues and trust issues must be addressed.

Suggestions for Further Research

The researcher suggests further research in the following areas relating to school district reorganization in Iowa:

- The effect of reorganization on the financial status of the new district, especially in regard to cash balance, spending authority, tax rates and tax revenues.
- The effect of reorganization on staffing in the new district.

- The effect of reorganization on student performance on standardized tests and the measure of achievement.
- The effect of reorganization on superintendent job longevity.

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Appendix A

The *Code of Iowa* as it applies to school district reorganization

- 274.4 RECORD OF REORGANIZATION FILED.
 - When an election on the proposition of organizing, reorganizing, enlarging, or changing the boundaries of any school corporation, or on the proposition of dissolving a school district, carries by the required statutory margin, or the boundary lines of contiguous school corporations are changed by the concurrent action of the respective boards of directors, the secretary of the school corporation shall file a written description of the new boundaries of the school corporation in the office of the county auditor of each county in which any portion of the school corporation lies.
 - 275.1 DECLARATION OF POLICY -- SURVEYS -- DEFINITIONS.
 - It is the policy of the state to encourage economical and efficient school districts which will ensure an equal educational opportunity to all children of the state. All areas of the state shall be in school districts maintaining kindergarten and twelve grades. If a school district ceases to maintain kindergarten and twelve grades excepts as otherwise provided in section 28E.9, 256.13, 280.15, 282.7, subsection 1 or subsections 1 and 3, or section 282.8, it shall reorganize within six months or the state board shall attach the school district not maintaining kindergarten and twelve grades to one or more adjacent districts. Voluntary reorganization under this chapter shall be commenced only if the affected school districts are
-

contiguous or marginally adjacent to one another. A reorganized district shall meet the requirements of section 275.3.

If a district is attached, division of assets and liabilities shall be made as provided in sections 275.29 to 275.31. The area education agency boards shall develop detailed studies and surveys of the school districts within the area education agency and all adjacent territory for the purpose of providing for reorganization of school districts in order to effect more economical operation and the attainment of higher standards of education in the schools. The plans shall be revised periodically to reflect reorganizations which may have taken place in the area education agency and adjacent territory.

- 275.2 SCOPE OF SURVEYS

- The scope of the studies and surveys shall include the following matters in the various districts in the area education agency and all districts adjacent to the area education agency: the adequacy of the education program, pupil enrollment, property valuations, existing buildings and equipment, natural community areas, road conditions, transportation, economic factors, individual attention given to the needs of students, the opportunity of students to participate in a wide variety of activities related to the total development of the student, and matters that may bear on educational programs meeting minimum standards as required by law. The plans shall also include suggested alternate plans that incorporate the school districts in the area education agency into reorganized districts that meet the

enrollment standards specified in section 275.3 and may include alternate plans proposed by school districts for sharing programs as an alternative to school reorganization.

- 275.3 MINIMUM SIZE

- No new school district shall be planned by an area education agency board nor shall any proposal for creation or enlargement of any school district be approved by an area education agency board or submitted to electors unless there reside within the proposed limits of such district at least three hundred persons of school age who were enrolled in public schools in the preceding school year. Provided, however, that the director of the department of education shall have authority to grant permission to an area education agency board to approve the formation or enlargement of a school district containing a lower school enrollment than required in this section on the written request of such area education agency board if such request is accompanied by evidence tending to show that sparsity of population, natural barriers or other good reason makes it impracticable to meet the school enrollment requirement.

- 275.4 STUDIES, SURVEYS, AND PLANS.

- In developing studies and surveys the area education agency board shall consult with the officials of school districts in the area and other citizens, and shall from time to time hold public hearings, and may employ such research and other assistance as it may determine reasonably necessary in order to properly carry on its survey and prepare definite plans of

reorganization. In addition, the area education agency board shall consult with the director of the department of education in the development of surveys and plans. The director of the department of education shall provide assistance to the area education agency boards as requested and shall advise the area education agency boards concerning plans of contiguous area education agencies and the reorganization policies adopted by the state board of education.

- 275.5 PROPOSALS FOR MERGER OR CONSOLIDATION.
 - A proposal for merger, consolidation, or boundary change of local school districts shall first be submitted to the area education agency board following the procedure prescribed in this chapter. Following receipt of a petition pursuant to sections 275.12, the area education agency board shall review its plans and determine whether the petition complies with the plans which had been adopted by the board. If the petition does not comply with the plans which had been adopted by the board, the board shall conduct further surveys pursuant to section 275.4 prior to the date set for the hearing upon the petition. If further surveys have been conducted by the board, the board shall present the results of the further surveys at the hearing upon the petition.
- 275.9 METHODS OF EFFECTUATION REORGANIZATION PLANS.
 - When any school district is enlarged, reorganized, or changes its boundaries pursuant to the plans hereinabove provided for, such enlargement, reorganization, or boundary change shall be accomplished by

the method hereinafter provided. The provisions of sections 275.1 to 275.5, relating to studies, surveys, hearings and adoption of plans shall constitute a mandatory prerequisite to the effectuation of any proposal for district boundary change. It shall be the mandatory duty of the area education agency board to dismiss the petition if the above provisions are not complied with fully.

- 275.11 PROPOSAL INVOLVING TWO OR MORE DISTRICTS.
 - Subject to the approval of the area education agency board, contiguous or marginally adjacent territory located in two or more school districts may be united into a single district in the manner provided in sections 275.12 to 275.22.
- 275.15 HEARING -- DECISION -- PUBLICATION -- APPEAL.
 - At a hearing held within ten days of the final date set for filing objections, all interested parties may present evidence and arguments both for and against the reorganization.
- 275.18 SPECIAL ELECTION CALLED -- TIME.
 - The area education administrator must file written notice of the proposed date of the election to reorganize the school district or districts with the county commissioner of elections of the county in the proposed school corporation which has the greatest taxable base. The proposed date shall be as soon as possible, but not later than November 30 of the calendar year prior to the calendar year in which the reorganization will take effect. The county commissioner of elections shall give notice of the election by one



publication in the same newspaper in which previous notices have been published regarding the proposed school reorganization, and in addition, if more than one county is involved, by one publication in a legal newspaper in each county other than that of the first publication. The publication shall not be less than four nor more than twenty days prior to the election.

Notice of an election shall not be published until the expiration of time for appeal.

- 275.24 EFFECTIVE DATE OF CHANGE.
 - When a school district is enlarged, reorganized, or changes its boundary pursuant to sections 275.12 to 275.22, the change shall take effect on July 1 following the date of the reorganization election held pursuant to section 275.18 if the election was held by the prior November 30. Otherwise the change shall take effect on July 1 one year later.

Appendix B

Barker Guidelines

- 1) A timeline should be established in advance for the carrying out of procedures involved in making an important decision. All aspects of such a timeline would naturally focus upon the anticipated date that the Board of Directors would make its final decision in the matter.
- 2) All segments of the community in the school district should be informed that a particular important decision is under consideration by the Board of Directors.
- 3) The public should be involved in providing sufficient input into the study and planning involved in important decision making.
- 4) Sufficient research, study and planning should be carried out by the board and groups and individuals selected by the board. Such things as student enrollment statistics, transportation costs, financial gains and losses, program offerings, plant facilities, and staff assignment need to be considered.
- 5) There should be an open and frank public discussion of the facts and issues involved.
- 6) A proper record should be made of all the steps taken in the making of the decision.

- 7) The final decision must be made in an open, public meeting and a record be made thereof.

Appendix C

Primary Factors Causing Districts to Reorganize

| District | Position | Declining enrollment | State incentives | Financial pressures | Increased opportunities for students | Search for similar partner |
|----------------------|----------|-------------------------|---------------------|------------------------|--|----------------------------------|
| Fairview CSD | | | | | | |
| Fairburn- Griffin | Supt. | X | | | | |
| | BD. | X | | X | | |
| Hiram | Supt. | | | | | |
| | BD. | X | | | | |
| Shady Grove CSD | | | | | | |
| Athens | Supt. | | X | | | |
| | BD. | X | X | X | X | |
| Brunswick | BD. | X | | | | |
| Oak Grove CSD | | | | | | |
| Jasper | Supt. | X | | | | |
| | BD. | X | | X | | |
| Lithonia | Supt. | X | | X | X | |
| | BD. | X | | X | X | |

Continued

Appendix C, cont'd

| District | Position | Declining enrollment | State incentives | Financial pressures | Increased opportunities for students | Search for similar partner |
|-----------------|----------|----------------------|------------------|---------------------|--------------------------------------|----------------------------|
| Maple Grove CSD | | | | | | |
| Conyers | Supt. | | | | | X |
| | BD. | | | | X | |
| Duluth | BD. | | | | X | |
| New Hope CSD | | | | | | |
| Sparta-Oconee | Supt. | X | | | X | |
| | BD. | X | | | | X |
| Toccoa-Zebulon | BD. | X | | | X | |
| Liberty CSD | | | | | | |
| Marietta | Supt. | | X | | | |
| | BD. | | | X | | |
| Norcross | BD. | | X | X | X | |

Appendix D

District Use of Outside Consultants

| | | No | | | Study districts |
|------------------|----------|------------|------------|-------------------|-----------------|
| | | consultant | Consultant | Study neighboring | considering |
| District | Position | used | used | districts | reorganization |
| Fairview CSD | | | | | |
| Fairburn-Griffin | Supt. | X | | | |
| | BD. | X | | | |
| Hiram | Supt. | X | | | |
| | BD. | X | | | |
| Shady Grove CSD | | | | | |
| Athens | Supt. | | X | | |
| | BD. | X | | | |
| Brunswick | BD. | X | | | |
| Oak Grove CSD | | | | | |
| Jasper | Supt. | X | X | X | X |
| | BD. | X | | | |
| Lithonia | Supt. | | | | |
| | BD. | | | | |

Continued

Appendix D, cont'd

| District | Position | No consultant used | Consultant used | Study neighboring districts | Study districts considering reorganization |
|-----------------|----------|--------------------|-----------------|-----------------------------|--|
| Maple Grove CSD | | | | | |
| Conyers | Supt. | X | | | |
| | BD. | | | | |
| Duluth | BD. | X | | | |
| New Hope CSD | | | | | |
| Sparta-Oconee | Supt. | | X | | X |
| | BD. | X | | | |
| Toccoa-Zebulon | BD. | | | X | |
| Liberty CSD | | | | | |
| Marietta | Supt. | X | | | |
| | BD. | X | | | |
| Norcross | BD. | X | | | |

Appendix E

Productive Strategies Used in the Reorganization Process

| District | Position | Seek stakeholder input | History of sharing | Cooperation between districts | Strong leadership | Dissemination of information |
|-----------------------|----------|------------------------------|--------------------------|-------------------------------------|----------------------|------------------------------------|
| Fairview CSD | | | | | | |
| Fairburn- Griffin | Supt. | | | X | | |
| | BD. | | | | X | |
| Hiram | Supt. | | | X | | |
| | BD. | X | | X | X | X |
| Shady Grove CSD | | | | | | |
| Athens | Supt. | | X | | | |
| | BD. | X | | X | | |
| Brunswick | BD. | | | X | | |
| Oak Grove CSD | | | | | | |
| Jasper | Supt. | | X | | | |
| | BD. | X | | | X | |
| Lithonia | Supt. | | | | | |
| | BD. | | X | | | |

Continued

Appendix E, cont'd

| District | Position | Seek stakeholder input | History of sharing | Cooperation between districts | Strong leadership | Dissemination of information |
|-----------------------|----------|------------------------------|--------------------------|-------------------------------------|----------------------|------------------------------------|
| Maple Grove CSD | | | | | | |
| Conyers | Supt. | | X | | | |
| | BD. | X | | | | |
| Duluth | BD. | X | | X | X | X |
| New Hope CSD | | | | | | |
| Sparta- Oconee | Supt. | X | | | | |
| | BD. | X | | | | |
| Toccoa- Zebulon | BD. | | X | | | |
| Liberty CSD | | | | | | |
| Marietta | Supt. | X | X | | | X |
| | BD. | | X | | X | |
| Norcross | BD. | X | | | | X |

Appendix F

Nonproductive Strategies Used in the Reorganization Process

| District | Position | Lack of trust / rivalries | Athletics / activities issues | Transportation issues | Concern over losing school |
|----------------------|----------|---------------------------------|-------------------------------------|--------------------------|----------------------------------|
| Fairview CSD | | | | | |
| Fairburn- Griffin | Supt. | | | | |
| | BD. | X | | X | |
| Hiram | Supt. | | | X | |
| | BD. | | | | |
| Shady Grove CSD | | | | | |
| Athens | Supt. | | | | X |
| | BD. | | X | | |
| Brunswick | BD. | | | | |
| Oak Grove CSD | | | | | |
| Jasper | Supt. | X | | | |
| | BD. | X | | | |
| Lithonia | Supt. | | | | |
| | BD. | | | X | |

Continued

Appendix F, cont'd

| District | Position | Lack of trust / rivalries | Athletics / activities issues | Transportation issues | Concern over losing school |
|--------------------|----------|---------------------------------|-------------------------------------|--------------------------|----------------------------------|
| Maple Grove CSD | | | | | |
| Conyers | Supt. | | | | |
| | BD. | | X | | |
| Duluth | BD. | | X | | |
| New Hope CSD | | | | | |
| Sparta- Oconee | Supt. | | | X | |
| | BD. | | | | X |
| Toccoa- Zebulon | BD. | | X | | X |
| Liberty CSD | | | | | |
| Marietta | Supt. | X | | | |
| | BD. | X | | | |
| Norcross | BD. | | | | |

Appendix G

Positive Unintended Consequences of Reorganization

| District | Position | Changes in activities | Improved financial condition | None | Broader community / new development | Improved |
|----------------------|----------|-----------------------------|------------------------------------|------|---|---------------------------------|
| | | | | | | special education program |
| Fairview CSD | | X | | | | |
| Fairburn- Griffin | Supt. | | | | | |
| | BD. | | | | | |
| Hiram | Supt. | | | | | |
| | BD. | | | | | |
| Shady Grove CSD | | | | | | |
| Athens | Supt. | X | X | | | |
| | BD. | X | | | | |
| Brunswick | BD. | | | | | |
| Oak Grove CSD | | | | | | |
| Jasper | Supt. | X | | | | |
| | BD. | X | | | | |
| Lithonia | Supt. | | | | | |
| | BD. | | | | | |

Continued

Appendix G, cont'd

| District | Position | Changes in activities | Improved financial condition | None | Broader community / new development | Improved special education program |
|--------------------|----------|-----------------------------|------------------------------------|------|---|---|
| Maple Grove CSD | | | | | | |
| Conyers | Supt. | | | | | |
| | BD. | X | | | | |
| Duluth | BD. | | X | X | X | |
| New Hope CSD | | | | | | |
| Sparta- Oconee | Supt. | | X | | | |
| | BD. | | X | | | |
| Toccoa- Zebulon | BD. | | | | | |
| Liberty CSD | | | | | | |
| Marietta | Supt. | | X | | | X |
| | BD. | | | X | | X |
| Norcross | BD. | | X | | X | |

Appendix H

Negative Unintended Consequences of Reorganization

| District | Position | Open enrollment out of new district | Considering another reorganization |
|------------------|----------|--|---------------------------------------|
| Fairview CSD | | | |
| Fairburn-Griffin | Supt. | | |
| | BD. | | |
| Hiram | Supt. | | |
| | BD. | | |
| Shady Grove CSD | | | |
| Athens | Supt. | | |
| | BD. | | |
| Brunswick | BD. | X | |
| Oak Grove CSD | | | |
| Jasper | Supt. | | X |
| | BD. | X | |
| Lithonia | Supt. | X | X |
| | BD. | X | |

Continued

Appendix H, cont'd

| District | Position | Open enrollment out of new district | Considering another reorganization |
|-----------------|----------|--|---------------------------------------|
| <hr/> | | | |
| Maple Grove CSD | | | |
| Conyers | Supt. | | |
| | BD. | | |
| Duluth | BD. | | |
| New Hope CSD | | | |
| Sparta-Oconee | Supt. | X | |
| | BD. | X | |
| Toccoa-Zebulon | BD. | X | |
| Liberty CSD | | | |
| Marietta | Supt. | | |
| | BD. | | |
| Norcross | BD. | | |

Appendix I

Additional Comments from Respondents

| District | Position | None | Smooth reorganization | Leadership | Continued enmity |
|----------|----------|------|--------------------------|------------------|------------------------|
| | | | | was important | between communities |

| | | | | | |
|------------------|-------|---|---|---|--|
| Fairview CSD | | | | | |
| Fairburn-Griffin | Supt. | | X | | |
| | BD. | | | X | |
| Hiram | Supt. | | X | | |
| | BD. | | X | X | |
| Shady Grove CSD | | | | | |
| Athens | Supt. | | X | | |
| | BD. | X | | | |
| Brunswick | BD. | X | | | |
| Oak Grove CSD | | | | | |
| Jasper | Supt. | X | | | |
| | BD. | | X | | |
| Lithonia | Supt. | X | | | |
| | BD. | X | | | |

Continued

Appendix I, cont'd

| District | Position | None | Smooth | Leadership | Continued enmity |
|-----------------|----------|------|----------------|------------|------------------|
| | | | reorganization | was | between |
| communities | | | | | |
| <hr/> | | | | | |
| Maple Grove CSD | | | | | |
| Conyers | Supt. | X | | | |
| | BD. | | X | | X |
| Duluth | BD. | X | | | |
| New Hope CSD | | | | | |
| Sparta-Oconee | Supt. | X | | | |
| | BD. | | | | X |
| Toccoa- | | | | | |
| Zebulon | BD. | X | | | |
| Liberty CSD | | | | | |
| Marietta | Supt. | | X | X | |
| | BD. | | X | X | |
| Norcross | BD. | | X | | |
| <hr/> | | | | | |

Appendix J

Interview Schedule

| Position | Name | Original | | Interview Location | Interview Date and Time |
|----------|------------------|-----------------------|-----------------------------|--|-------------------------|
| | | School District | Reorganized School District | | |
| Supt. | Jim Williams | Fairburn-Griffin | Fairview CSD | Restaurant in Mount Zion, IA. | 4/10/08 7:00 PM |
| Supt. | Dr. Mary Johnson | Jasper | Oak Grove CSD | Johnson Consulting, Honey Creek, IA. | 4/11/08 9:00 AM |
| Supt. | Patricia Jones | Marietta and Norcross | Liberty CSD | Liberty CSD library, Marietta, IA. | 4/11/08 11:00 AM |
| BD | John Green | Marietta | Liberty CSD | Zingara Industries, Marietta, IA. | 4/11/08 12:00 PM |
| BD | Linda Davis | Norcross | Liberty CSD | ICN room, Liberty CSD, Marietta, IA. | 4/11/08 1:30 PM |
| BD | Mike Miller | Hiram | Fairview CSD | Sunnyside Funeral Home, Sunnyside, IA. | 4/11/08 4:30 PM |
| Supt. | Bill Wilson | Hiram | Fairview CSD | Wilson home, Pine Grove, IA. | 4/12/08 9:00 AM |

Continued

Appendix J, cont'd

| Position | Name | Original | | Interview Location | Interview Date and Time |
|----------|-------------------|----------------------|--------------------------------|---|-------------------------------|
| | | School District | Reorganized School District | | |
| BD | David Moore | Fairburn- Griffin | Fairview CSD | Moore home, rural Fairburn, IA. | 4/12/08 10:00 AM |
| BD | Charles Taylor | Jasper | Oak Grove CSD | Taylor home, Jasper, IA. | 4/24/08 4:00 PM |
| BD | Paul Thomas | Sparta- Oconee | New Hope CSD | Oconee History Museum, Oconee, IA. | 4/25/08 8:00 AM |
| BD | George Lee | Toccoa | New Hope CSD | Lee home, rural Sparta, IA. | 4/25/08 4:00 PM |
| BD | Steve Thompson | Athens | Shady Grove CSD | Rockdale Co. Court House, Athens, IA. | 4/26/08 12:00 PM |
| BD | Brian Martin | Brunswick | Shady Grove CSD | Martin home, rural Brunswick, IA. | 4/26/08 3:00 PM |
| Supt. | Tony Robinson | Lithonia | Oak Grove CSD | Restaurant, Loganville, IA. | 5/1/08 7:00 PM |

Continued

Appendix J, cont'd

| Position | Name | Original | | Interview Location | Interview Date and Time |
|----------|----------------|----------------------|-----------------------------|--|-------------------------|
| | | School District | Reorganized School District | | |
| BD | Kevin Clark | Conyers | Maple Grove CSD | Clark home, rural Conyers, IA. | 5/2/08 10:00 AM |
| BD | Matt Lewis | Lithonia | Oak Grove CSD | Lewis home, Lithonia, IA. | 5/3/08 10:00 AM |
| Supt. | Dr. Tim Walker | Conyers | Maple Grove CSD | Walker home, rural Tallulah, IA. | 5/15/08 7:00 PM |
| BD | Rich Wright | Duluth | Maple Grove CSD | Board room of River Carron Albumen, Conyers, IA. | 5/16/08 8:00 AM |
| Supt. | Dr. Ted Adams | Athens and Brunswick | Shady Grove CSD | Supt.'s office, Shady Grove CSD, Athens, IA. | 5/30/08 1:30 PM |
| Supt. | Joe Smith | Lovejoy | Heritage CSD | Supt.'s office, Heritage CSD, Valdosta, IA. (Preliminary test interview - not included in study). | 10/26/07 10:30 AM |

Appendix K

Reorganization Actions in Iowa 1986-2006

| Reorganization date | First original school district | Second original school district | New school district |
|------------------------|-----------------------------------|------------------------------------|----------------------------|
| 7/1/88 | Arnolds Park | Milford | Okoboji |
| 7/1/88 | Bayard | Coon Rapids | Coon Rapids – Bayard |
| 7/1/89 | Havelock-Plover | Pocahontas | Pocahontas Area |
| 7/1/89 | Panora-Linden | Y-J-B | Panorama |
| 7/1/90 | Calamus | Wheatland | Calamus-Wheatland |
| 7/1/91 | Colo | NESCO | Colo-Nesco |
| 7/1/91 | Hartley-Melvin | Sanborn | Hartley-Melvin-Sanborn |
| 7/1/91 | Prairie City | Monroe | PCM |
| 7/1/91 | Central Webster | Dayton | Southeast Webster |
| 7/1/92 | Beaman-Conrad- Liscomb | Union-Whitten | BCLUW |
| 7/1/92 | Garwin | Green Mountain | GMG |
| 7/1/92 | Irwin | Manilla | IKM |
| 7/1/92 | Buffalo Center | Lakota | Buffalo Center-Rake-Lakota |
| 7/1/92 | LDF | SEMCO | East Marshall |

Continued

Appendix K, cont'd

| Reorganization date | First original school district | Second original school district | New school district |
|------------------------|-----------------------------------|------------------------------------|--------------------------|
| 7/1/92 | Jefferson | Scranton | Jefferson-Scranton |
| 7/1/92 | Steamboat Rock | Wellsburg | Wellsburg-Steamboat Rock |
| 7/1/93 | Adel-DeSoto | Central Dallas | Adel-DeSoto-Minburn |
| 7/1/93 | Center Point | Urbana | Center Point-Urbana |
| 7/1/93 | Clarion | Goldfield | Clarion-Goldfield |
| 7/1/93 | Clay Central | Everly | Clay Central/Everly |
| 7/1/93 | Hubbard | Radcliffe | Hubbard-Radcliffe |
| 7/1/93 | Manson | Northwest Webster | Manson-Northwest Webster |
| 7/1/93 | Marcus | Meriden- Cleghorn | Marcus-Meriden-Cleghorn |
| 7/1/93 | Lost Nation | Midland | Midland |
| 7/1/93 | Fonda | Newell- Providence | Newell-Fonda |
| 7/1/93 | Pocahontas Area | Rolfe | Pocahontas Area |

Continued

Appendix K, cont'd

| Reorganization date | First original school district | Second original school district | New school district |
|------------------------|-----------------------------------|------------------------------------|----------------------|
| 7/1/93 | Palmer | Pomeroy | Pomeroy-Palmer |
| 7/1/93 | Cedar Valley | Prairie | Prairie Valley |
| 7/1/93 | Carson-Macedonia | Oakland | Riverside |
| 7/1/93 | Lytton | Rockwell City | Rockwell City-Lytton |
| 7/1/93 | Crestland | Schaller | Schaller-Crestland |
| 7/1/93 | Sioux Rapids- Rembrandt | Sioux Valley | Sioux Central |
| 7/1/93 | Paullina, Primghar | Southerland | South O'Brien |
| 7/1/93 | Lake City | Lohrville | Southern Cal |
| 7/1/93 | Dysart-Geneseo | La Porte City | Union |
| 7/1/93 | Shellsburg | Vinton | Vinton-Shellsburg |
| 7/1/94 | Britt | Kanawha | West Hancock |
| 7/1/94 | Dow City-Arion | Dunlap | Boyer Valley |
| 7/1/94 | Mar-Mac | M-F-L | MFL Mar-Mac |
| 7/1/94 | Maurice-Orange City | Floyd Valley | MOC-Floyd Valley |

Continued

Appendix K, cont'd

| Reorganization date | First original school district | Second original school district | New school district |
|------------------------|-----------------------------------|------------------------------------|-----------------------------|
| 7/1/94 | Battle Creek | Ida Grove | Battle Creek – Ida Grove |
| 7/1/94 | Belmond | Klemme | Belmond-Klemme |
| 7/1/94 | Eddyville | Blakesburg | Eddyville-Blakesburg |
| 7/1/95 | Clarence-Lowden | Lincoln | North Cedar |
| 7/1/95 | Amana | Clear Creek | Clear Creek-Amana |
| 7/1/95 | Midland | Oxford Junction | Midland |
| 7/1/95 | Mallard | West Bend | West Bend-Mallard |
| 7/1/95 | Dumont | Hampton | Hampton-Dumont |
| 7/1/95 | Benton | Norway | Benton |
| 7/1/96 | Hancock-Avoca | Shelby | A-H-S-T |
| 7/1/96 | Eastwood | Willow | River Valley |
| 7/1/96 | Buffalo Center- Rake-Lakota | Thompson | North Iowa |
| 7/1/96 | Lake View – Auburn | Wall Lake | Wall Lake View Auburn |
| 7/1/96 | Dike | New Hartford | Dike-New Hartford |
| 7/1/97 | Estherville | Lincoln Central | Estherville-Lincoln Central |

Continued

Appendix K, cont'd

| Reorganization date | First original school district | Second original school district | New school district |
|------------------------|-----------------------------------|------------------------------------|-------------------------|
| 7/1/97 | Nashua | Plainfield | Nashua-Plainfield |
| 7/1/98 | Gladbrook | Reinbeck | Gladbrook-Reinbeck |
| 7/1/00 | Bridgewater- Fontanelle | Greenfield | Nodaway Valley |
| 7/1/01 | Dexfield | Stuart-Menlo | West Central Valley |
| 7/1/01 | Burt | Algona | Algona |
| 7/1/01 | Wellsburg- Steamboat Rock | Ackley-Geneva | AGWSR |
| 7/1/03 | Little Rock | George | George-Little Rock |
| 7/1/04 | Parkersburg | Aplington | Aplington-Parkersburg |
| 7/1/04 | Fox Valley | Van Buren | Van Buren |
| 7/1/05 | Garnavillo | Guttenberg | Clayton Ridge |
| 7/1/05 | Grand | Southeast Webster | Southeast Webster-Grand |

Source: Iowa Department of Education, 2006